HIRE WORKFORCE

HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS)

TRAINING PARTICIPATION GUIDE

HRMS
PEOPLESOFT 9.1
REVISED 9/13/2022

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CHAPTER 1

HIRING EMPLOYEES

Objectives

By the end of this chapter, you will be able to:

- Hire an employee
- Enter employee pay information

Overview

Hiring employees can be a time-consuming process involving several different individuals in different parts of the City. One person hires the employee; another signs the employee up for benefits; someone in payroll gathers the appropriate information to ensure the new hire gets paid, and so on. There are emails to be sent and forms to be filled out.

With the Hire Employee workflow process, your Human Resources Management System (HRMS) will handle these work items for you. You hire an employee into HRMS. Workflow takes over from there. All of this is done by the system behind the scenes.

When you sit down to enter a new employee in HRMS, do it at a time when you can focus 100% of your attention to what you are doing. It can be very easy to "lose" a new hire entry in HRMS because you didn't finish the new hire entry and hitting save before the system timed you out or possibly because you somehow navigated away from the new hire screens in HRMS. If this happens to you, do not attempt to re-enter the new hire data, contact the Certification Section of Employee Relations to have your lost new hire retrieved for you.

The steps involved in hiring a new employee are:

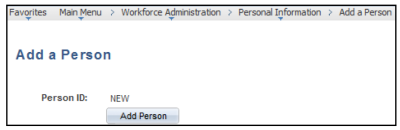
- Completing the Personal Data pages in Administer Workforce (GBL)
- Completing the Job Data & Employment Pages in Administer Workforce (GBL)
    - Saving the Hire action will initiate the New Hire Workflow.

Hiring Employees

Adding a Person

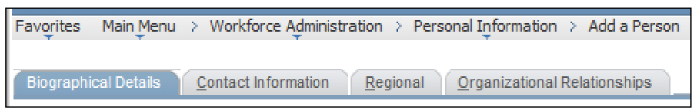
You will enter all new hires onto the system by navigating through this path in Workforce Administration: Main Menu > Workforce Administration > Personal Information > Add a Person. This action will take you to the Add a Person dialog box.

- Click on the Add Person button.



Personal Relationship Pages

There are four tabs in the Personal Relationship component, Biographical Details, Contact Information, Regional and Organizational Relationships. ***Note:* Because many fields in the Hire component are required, complete *ALL* the hiring pages before you save your entries.**



Biographical Details

The Biographical Details tab contains the effective date of the hire, the employees name, date of birth, gender, highest education level, marital status, and national ID (social security #)..

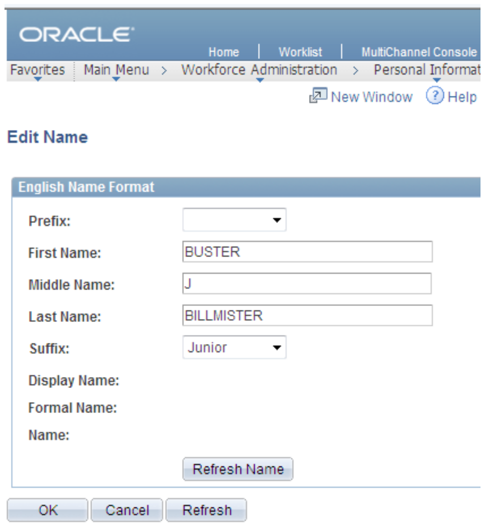
Name Section:

When entering a Name into HRMS you must use the following format explained below and **ENTER THE EMPLOYEE'S LEGAL NAME EXACTLY AS IT APPEARS ON THEIR SOCIAL SECURITY CARD (SSC).**

On the first day that your new employee starts work payroll personnel should make a copy of their SSC and keep this copy in their departmental personnel file; this includes all temporary type employee's as well. If the employee doesn't have a SSC at time of hire they must obtain one from the Social Security Office and provide you with a copy. Once you receive it be sure to double check that the name you entered in HRMS is the correct legal name.

- **Effective Date** must be the new employee's first day on the job.
- Leave the Format Type drop down box defaulted to English.
- Click on the Add Name button - The system will automatically send you to the Edit Name page where you enter the new employee's name.
- **Enter the Employee's Name**:
  - Use ALL capital letters

- **Prefix Box**: Do **NOT** enter anything in the Prefix drop-down box
- **First Name Box**: Full First name, not a shortened name
- **Middle Name Box**: Middle Initial only, not full Middle name
  - The exception to this would be if they have an initial for their first name like: P. Allen Smith – In this case do enter Allen as the Middle name.
- **Last Name Box**: Complete legal Last name
- **Suffix Box**: If they have a suffix it should be added here.
  - Suffix's should **NOT** be entered in the last or first name box.



When you are finished entering the new employee's name data, click the OK button; the system will automatically send you back to the Biographical Details page.

Finish entering the <u>REQUIRED</u> data on the Biographical Details page.

Biographical Information Section:

- Date of Birth - this must be an accurate birth date.

Biographical History Section:

- Effective Date - For <u>new-hires</u>, this must be first day on the job.
  - This date is equal to the effective dated data inside of the Biographical History Section when it's changed in the future.
- Gender - Enter selection from drop-down.
- Marital Status - Enter selection from drop-down.

- As of Date - Enter effective date of action you selected from drop down in Marital Status field.
    - **Note:** The "as of date" for marital status cannot be any earlier than the employee's first hire date.

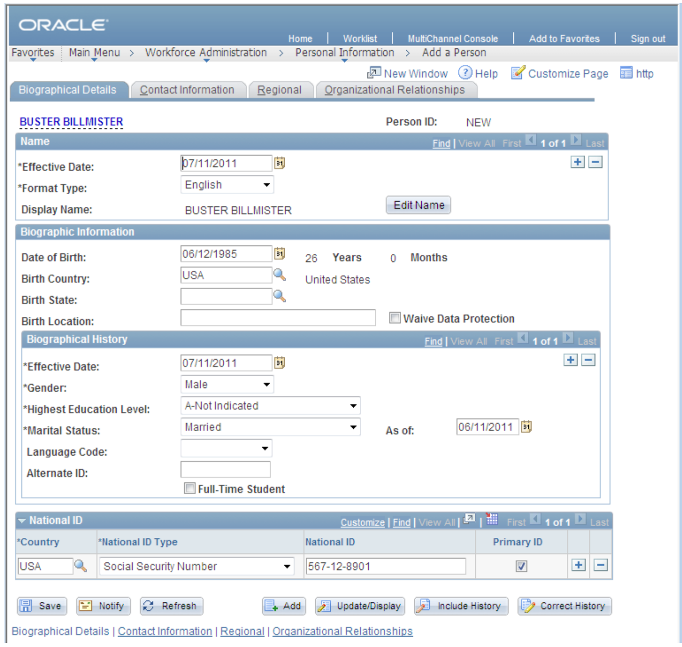
National ID Section:

- National ID - Enter employee's Social Security Number exactly as it appears on the Social Security Card.
- Primary ID – The Primary ID checkbox Must be checked

The following information is **NOT required** on the Biographical Details Page:

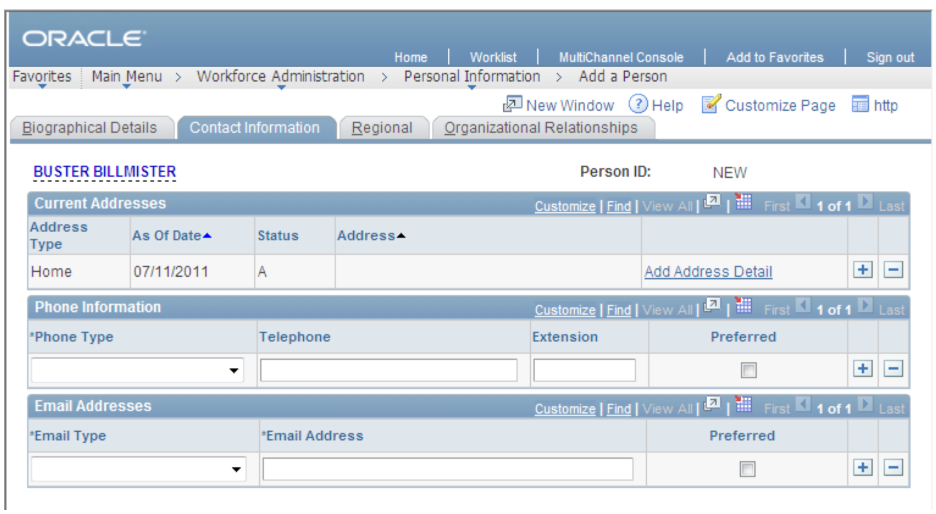
- Birth Country
- Birth State
- Birth Location
- Waive Protection Data
- Highest Edu. Level
- Language Code
- Alternate ID – Previous Pension Number
- Full Time Student

When you are finished entering data, the Biographical Details page should look similar to the example:



Contact Information

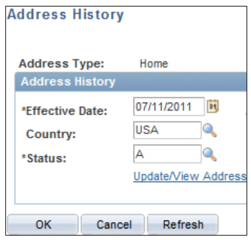
Click on the **Contact Information** tab. This is where you will enter the new employee's personal & business address, phone number, & E-mail address.



Addresses Section

In the Current Addresses section:

- Click on the <u>Add Address Detail</u> hyperlink, in this case it's the first one shown and you will be updating the **Home** address. The system will send you to the Address History Page. Enter the data below:
  - **Effective date** (for new hires, the first day of work), **Country = USA**
  - Click on the <u>Add Address</u> hyperlink under the status box. The system will send you to the Edit Address page.



When entering addresses, the required fields are listed below and must be entered in:

- Proper US Postal Service format
- ALL Capital Letters

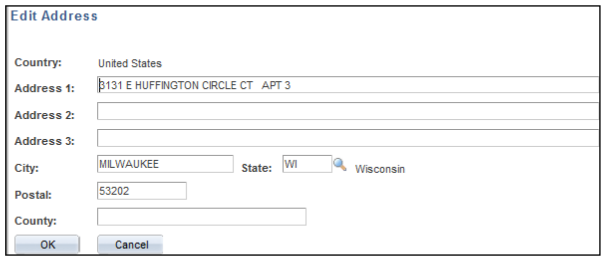
<u>A few important things to know when entering home & mailing addresses:</u>

- **Special Characters, Punctuation, & Symbols can <u>NO LONGER</u> be entered in an address.**
  - The new procedure for entering apartment or unit #'s will be to type 3 spaces after the end of the street address in address line 1 and then type APT 3 or UNIT 3 for example.
- **Address data in any address line 1 or 2 box cannot exceed 28 characters as HCM cannot print this on a check if it exceeds this length. Only use Address line 2 if you need 2, however use it if you must.**
- **<u>Proper Street Address Formatting:</u>**
  - Enter the directional as E, W, N, & S
    - **<u>NOT</u>** as East, West, etc
  - Numbered streets should be listed as just the Street #, 87, 92, 103
    - **<u>NOT</u>** 87^{th}, 92^{nd}, 103^{rd}
  - Enter the address suffix as ST, CT, PL, LN, AVE, etc
    - **<u>NOT</u>** as Street, Lane, Place, etc
  - Apartment or unit # it should be entered after the address in the Address 1 line
    - Type 3 spaces after the end of the street address in address line 1 and then type APT 3 or UNIT 3 for example
      - **<u>Example</u>**: 3131 E HUFFINTON CIRCLE CT   APT 3

Enter the Address, the required fields and formats are as follows:

- **Address 1**
- **City**: All spelled out
- **State**: 2 Characters
- **Postal:** 5 Digit postal code

When you are finished entering data, the Edit Address page should look similar to the example. Click the **OK** button when you are finished.



After clicking OK on the edit Address page, the system will send you back to Address History page; verify the data entered is correct then click OK to return back to the Contact Info page.

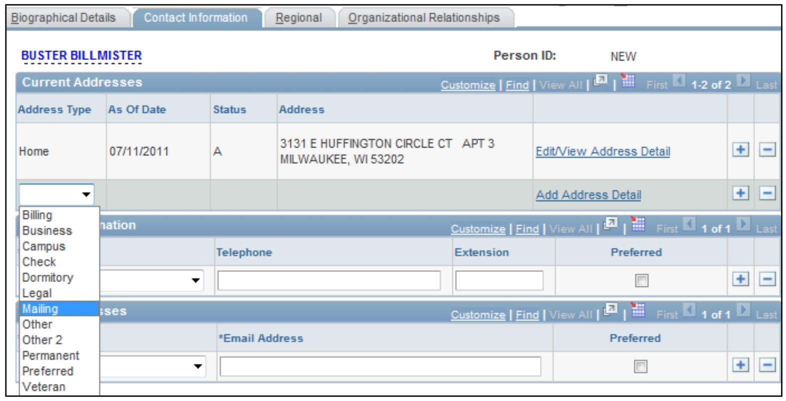
MAILING ADDRESS:

If the employee has a separate **Mailing Address**, simply insert a second address type in the current address section of the Contact Information tab by clicking the [+] to the right of the Edit/View Address Detail hyperlink for the home address. The picture below shows you what this action should look like.

- Select the address type of Mailing, click add address detail, and enter the mailing address.

Things to check for when entering a Mailing Address:

- Address History Page:
  - Effective Date: Make sure this is the correct date, Date of Hire for a hire entry, or date Mailing address is effective if it's being added as a New Mailing address when an employee receives it.
  - Country: USA
- Edit Address Page:
  - Address 1: Same required format as pg#8. All capital letters and no punctuation.
  - City
  - State
  - Postal


Biographical Details
Contact Information
Regional
Organizational Relationships
BUSTER BILLMISTER
Person ID:
NEW
Current Addresses
Customize | Find | View All
First 1-2 of 2 Last
Address Type
As Of Date
Status
Address
Home
07/11/2011
A
3131 E HUFFINGTON CIRCLE CT APT 3
MILWAUKEE, WI 53202
Edit/View Address Detail
Add Address Detail
Billing
Business
Campus
Check
Dormitory
Legal
Mailing
Other
Other 2
Permanent
Preferred
Veteran
Telephone
Extension
Preferred
*Email Address

Phone and E-Mail Addresses Section

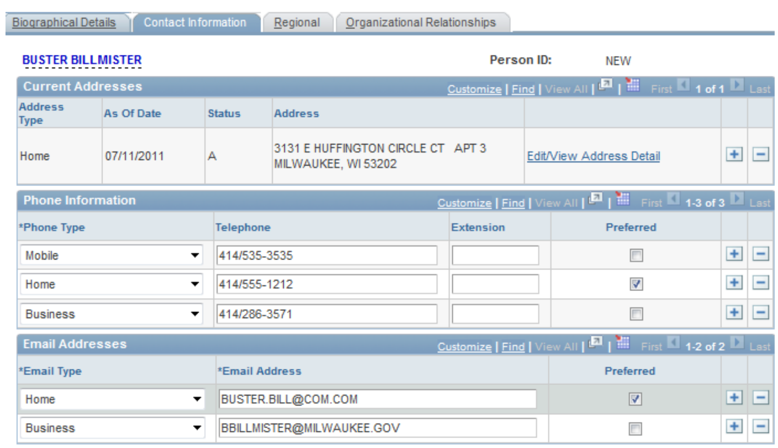
Enter the employee's **PHONE** number(s) in the Phone Information field.

- Select a Phone Type (Mobile, Home, Business, etc) for each phone # type, and then enter the complete 10 digit phone # with no symbols. The system will format the phone # once you tab out of the field.
- If the employee has more than one phone number, click to the right in the phone information box and follow the steps above.
- **Select the Preferred checkbox** for which phone # is the preferred #, **even if only 1**.
    - **You MUST designate one as Preferred.**

Enter the employee's **E-Mail** addresses in the E-mail addresses section.

- Select an E-Mail Type (Home or Business) for each E-Mail type, and then enter the complete address.
    - Always enter their City E-Mail address and try and get their primary personal E-Mail address as well
- To enter more than one e-mail address, click to the right in the E-Mail section.
- **Select the Preferred checkbox** for which phone # is the preferred #, even if only 1
    - **You MUST designate one as Preferred.**

When done, the Contact Information page should look similar to below. **Click on the Regional Tab.**

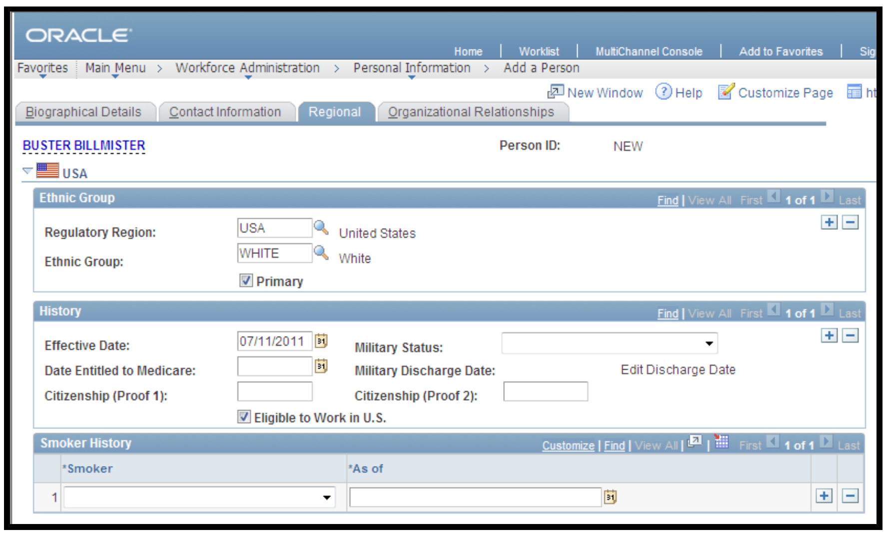


Regional

The only REQUIRED FIELD on the **Regional** tab is Ethnic Group. Click the to the right of the Ethnic Group field and select appropriate group for new employee.

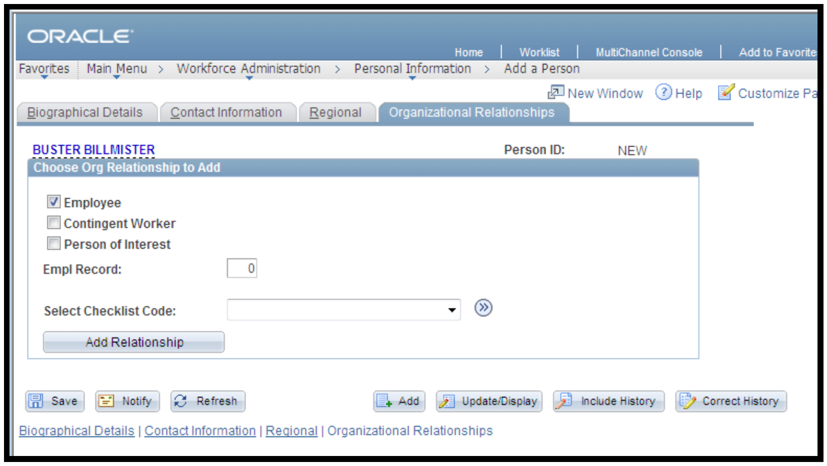
- **Ethnic Group: <u>VERY IMPORTANT</u>:** This field must be populated, do NOT leave blank and try to not pick not specified.
  - If the employee lists more than 1 ethnic group it can be added in to employee's personal information record by clicking the + sign to insert a second row.
  - **VERY IMPORTANT: You MUST designate one ethnic group as primary,** no matter if one is listed or multiple**.** One must be designated as primary.
- **Military History** at this time do NOT enter anything here, leave whatever date that defaults in as is. Military status information should be kept in the departmental personnel file.
- **Smoker History** should **<u>NEVER</u>** be entered.

Click on the **Organizational Relationships** tab when you have finished on the Regional tab.



On the **Organizational Relationships** tab **<u>ONLY</u>** do following:

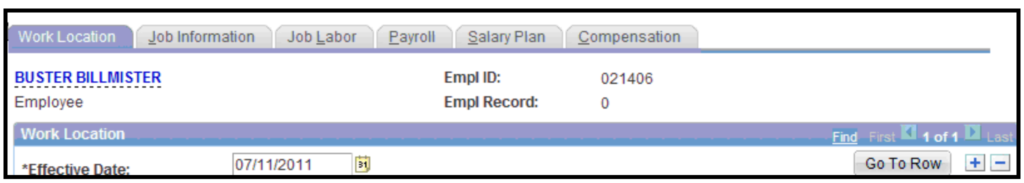
- Check the **Employee** box
  - Do **<u>NOT</u>** Change the Empl Record # (Leave it as **0** as it's defaulted as)
  - Do **<u>NOT</u>** select a checklist code.
- **Click** on the **Add the Relationship** button. The system will automatically send you to the Job Data Component after you click the button to finish making the Job Data entries.



Entering Employee Job or Assignment Information by Job Code

Job Data Component

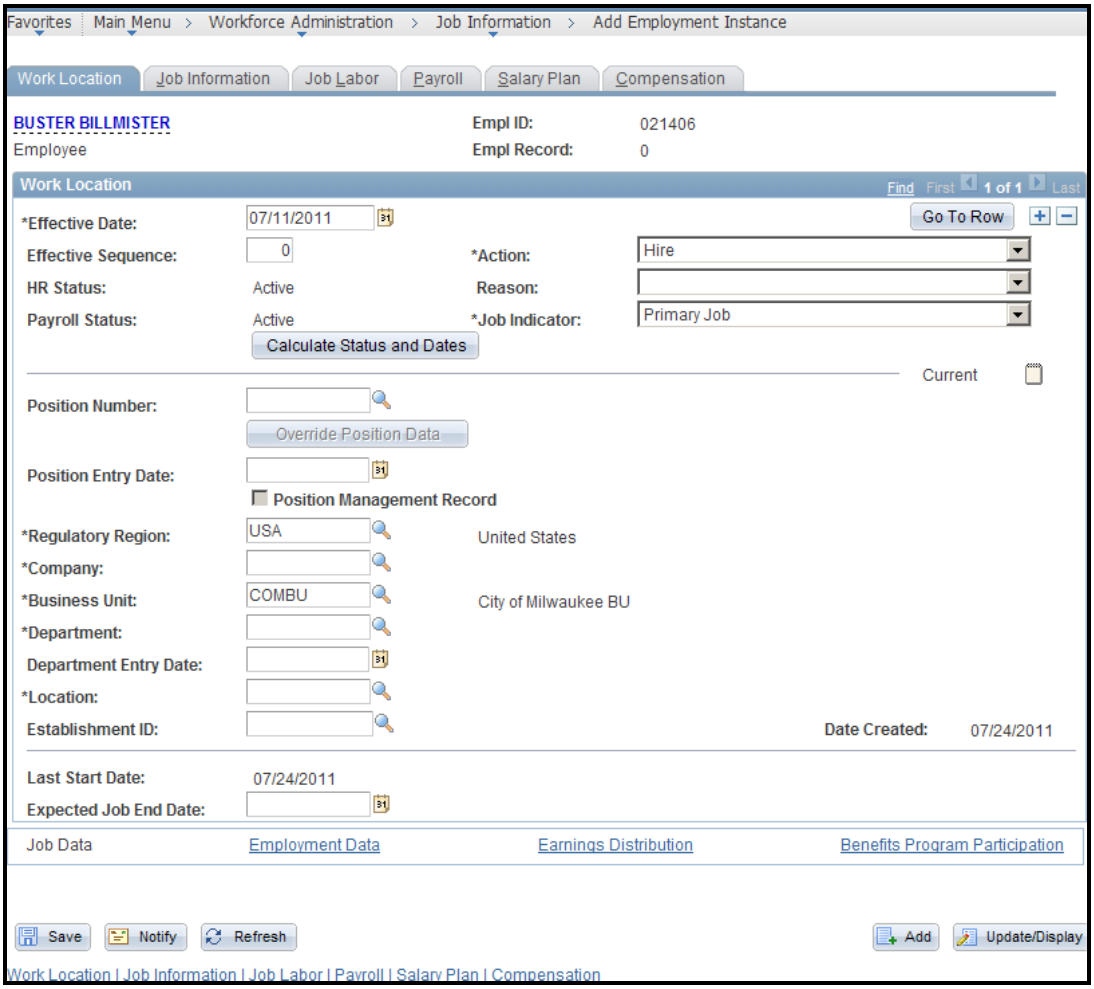
On the Job Data Component you will enter data related to the new employee's job by filling out the Work Location, Job information, Job Labor, Payroll, Salary Plan and **Compensation** tabs and also on the Employment Data, Earnings Distribution, & Benefits Program Participation links at the bottom of the page..



Work Location

The first page in the Job Data component, Work Location, is where you indicate that you are hiring the employee. You also enter information that pertains to the employee's location within the City.

- **Once in Job Data, Immediately write down the employee ID #.**
  - This is where you will first see employee ID# that it is created; from the previous personal data screens, on the Organizational Relationship page after you select the Org Relationship of Employee and Click "Add Relationship" the employee ID# is created.

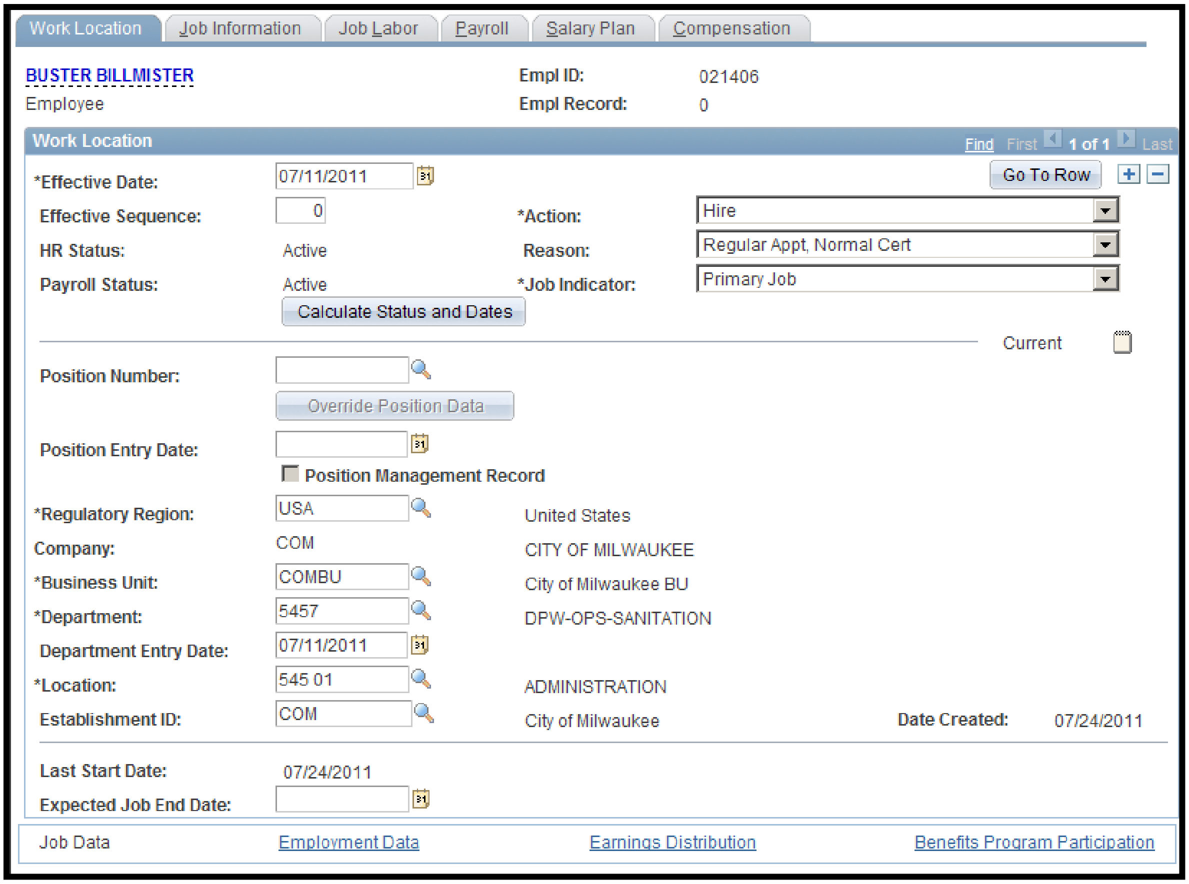

Favorites
Main Menu
Workforce Administration
Job Information
Add Employment Instance
Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation
BUSTER BILLMISTER
Employee
Empl ID:
021406
Empl Record:
0
Work Location
Find
First
1 of 1
Last
*Effective Date:
07/11/2011
Go To Row
Effective Sequence:
0
*Action:
Hire
HR Status:
Active
Reason:
Payroll Status:
Active
*Job Indicator:
Primary Job
Calculate Status and Dates
Current
Position Number:
Override Position Data
Position Entry Date:
Position Management Record
*Regulatory Region:
USA
United States
*Company:
*Business Unit:
COMBU
City of Milwaukee BU
*Department:
Department Entry Date:
*Location:
Establishment ID:
Date Created:
07/24/2011
Last Start Date:
07/24/2011
Expected Job End Date:
Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Save
Notify
Refresh
Add
Update/Display
Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Work Location page required fields are:

- **FIRST, Click the "Calculate Status and Dates" button before proceeding to the required fields below.**
- ***Effective Date*:** Must be new employee's first day on the job (Start Date)
- ***Action:*** Action must be **HIRE** for newly HIRED employees (First time hire to City of Milwaukee, or first time hire into Peoplesoft).
- ***Reason:*** Select the appropriate Hire Reason from the drop down menu
- ***Job Indicator*:** The Job Indicator must be **Primary** when hiring New Employee
- ***Position #*:** This field is required depending on the department, for this first example we will skip it..
- ***Regulatory Region:*** Value should be **USA**
- ***Company*:** Value should be **COM**
- ***Business Unit*:** Value should be **COMBU**
- ***Department*:** Enter appropriate 4 digit Department ID# (Dept#)
- ***Dept Entry Date***: In this case is the New Hires Start Date, otherwise it will default to the date the Dept# is changed (automatically updates each time the Dept# is changed).
  - This field defaults to the effective date of the row whenever the Dept# is changed.
- ***Location:*** Enter appropriate location # (Format is a 3 digit # space 2 digit #: XXX XX)
- ***Establishment ID***: Value should be **COM**
- ***Expected Job End Dt***: This field should NOT be used.

When you are finished entering data on the Work Location tab, it should look similar to the example below.

  - UNLESS you have entered a Position #, then see the hire by Position # example that follows after this one for accurate looking screenshots and directions.
- **Click on the Job Information tab** when you have finished entering the data on this tab.


Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

BUSTER BILLMISTER
Employee

Empl ID: 021406
Empl Record: 0

Work Location — Find | First 1 of 1 Last

*Effective Date: 07/11/2011 — Go To Row

Effective Sequence: 0
*Action: Hire
HR Status: Active
Reason: Regular Appt, Normal Cert
Payroll Status: Active
*Job Indicator: Primary Job

Calculate Status and Dates

Current

Position Number:

Override Position Data

Position Entry Date:

Position Management Record

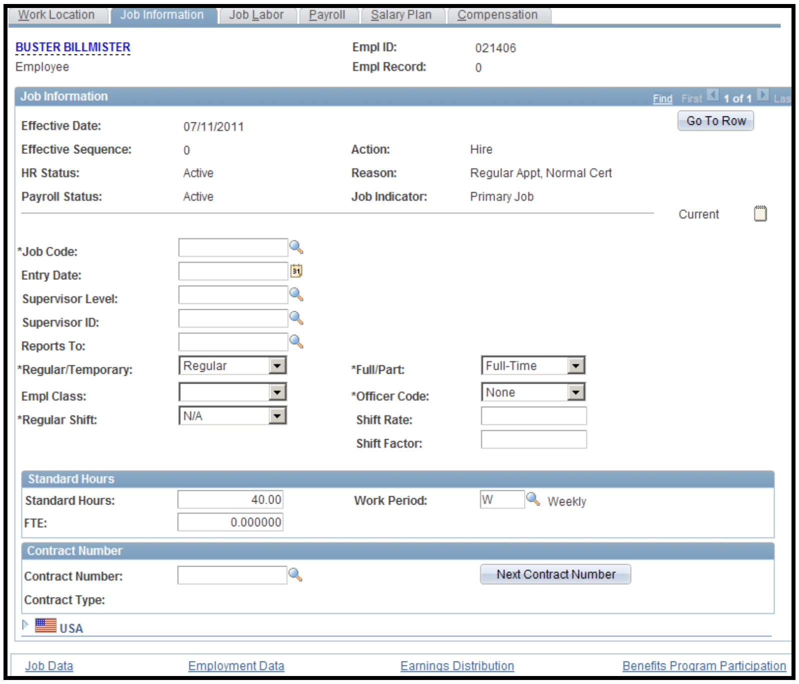
*Regulatory Region: USA — United States
Company: COM — CITY OF MILWAUKEE
*Business Unit: COMBU — City of Milwaukee BU
*Department: 5457 — DPW-OPS-SANITATION
Department Entry Date: 07/11/2011
*Location: 545 01 — ADMINISTRATION
Establishment ID: COM — City of Milwaukee
Date Created: 07/24/2011

Last Start Date: 07/24/2011
Expected Job End Date:

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Job Information

On the Job Information tab, you enter & maintain job and appointment specific related data for the employee. Some fields on this page default from other fields, based on the Position ID#, Department#, and Job Code# you assign to the employee. If necessary, you can edit most of these defaults.



<u>Finding a Job Code # and A couple Tips & FYI's on searching for a Job Code:</u>

- Click on the hour glass next to the empty box for the Job Code field. To Search, type in the official job title in the Description box and hit the lookup button. If you aren't seeing your desired results try typing in just the first word of the job title. If you still aren't seeing what you need type in the first letter of the Job Title. Sometimes Job Titles are abbreviated which makes them hard to find.

- **Job Code Table:** You can also look it up on the **Job Code Table:** Main Menu < Set Up HRMS < Foundation Tables < Job Attributes < Job Code Table

- <u>VERY IMPORTANT THING you need to know when selecting a Job Code:</u> there are a few "FLSA non exempt" job titles that have multiple union designations therefore a Job Code is created for each union's suffix Common Job titles like this are Office Assistants, Program Assistants, and Laborer job titles but there are many, **<u>it's important to choose the correct JC# with the correct union designation suffix when there are multiple choices</u>**. Note & Example: If you are hiring a person into a position that is Non Rep (NR suffix) and a Job Code only exists for DC48 contact DER Compensation section to discuss and possibly get one created.

    - DC48 (JC Suffix DC), NMNR (JC Suffix NR), Local 61 (JC Suffix 61), Aleasp (JC Suffix PD), AFSCME/DC48 (JC Suffix F_#_ (Like F1 or F2) <u>and a few others</u>. Also, the Fire related JC's that end in A is 8 hour and F is 24 hour.

    - Some Union/Employee Classifications don’t have a suffix like: “Management” (old Management pay plan job titles and Elected Officials), City Attorney, Public Health Nurses, Scientific Personnel, and many more.

- **Note on Position ID# use:** If you entered position ID # on the Work Location tab, see the Hire by position ID# instructions next after these Hire by Job Code Instructions.

Job Information Section of Job Information Tab (If the field isn't mentioned here leave the field alone)**:**

- ***Job Code (JC#)***: Enter the job code #.
- ***Entry Date:*** In this case it MUST be the New Hires Start Date (Effective Date of Hire entry), otherwise it will default to the effective date the JC# is changed (automatically updates each time the JC# changes).
- ***Supervisor Level:*** LEAVE ALONE, sometimes a value is defaulted in when a Position ID# is entered.
- ***Supervisor ID:*** We do not use this field. You could enter the employee's current supervisor's employee ID# here, but then you must remember to maintain that each time it changes by inserting a row. We do not have existing action/reasons for this purpose. **Never use this field when a Position ID# is entered.**
- ***Reports To:*** LEAVE ALONE, this is auto filled in when a Position ID# is entered.
- ***Reg/Temp:*** Enter appropriate Employment Type. Regular or Temporary (Non Regular city employees)
- ***Empl Class:*** Choose the Civil Service status; it relates to the type of employee/appointment they are.
  - Choices are: Emergency, Exempt, Fire, Legal, Non Sworn, Police, Provisionl, Regular, and Temporary.
  - **Note:** whether they are a Regular or Temporary Employee (dictated from the Reg/Temp field and doesn't matter which for this purpose) and they are given a Temporary, Provisional, Emergency or even Exempt appointment you must pick that Empl Class.
- ***Full/Part Time****:* Indicate the correct Full/Part status for the employee from the chart below.
  - The values entered in ***Regular/Temporary*** and ***Full/Part*** *Time* will be used by Benefits Administration to determine eligibility requirements.

When you select:	The employee receives:
Full-Time	Full Benefits
Half-Time	Half of all Benefits
Less than Half-Time	**No Benefits**
More Than Half-Time	Full or Pro-Rated Benefits
Seasonal	Benefits received after 2,080 hours

  - **Note for TEMPORARY employee's:** Reg/Temp status of Temporary should have a Full/Part value of Less than Half Time ALWAYS.
- **Officer Code:** Should always be **NONE** as it defaults, UNLESS someone is appointed to a position then you change it to APPOINTED (Elected Officials, Directors that are appointed, etc..)
- ***Reg Shift***, ***Shift Rate, & Shift Factor:*** LEAVE ALONE; we do not use this field.

Standard Hours Section of Job Information Tab:

- ***Standard Hours (STD Hrs)***: Defaults to 40.00 for the majority of employees; 49.8 for Firefighting; 10.00 for Ballot Clerks. Change if necessary.
  - Part-time employees (Anyone other than full time or Seasonal's who aren't full time), enter the actual hours worked in a standard week, such as Standard Hours = 32.
- ***Work Period:*** LEAVE ALONE, whatever defaults here is the correct value. Usually W (Weekly)
- ***FTE***: The FTE (Full-Time Equivalency) is the **%** of full time the employee should normally work in this job.

- The <u>system automatically calculates this value</u> based on the standard hours entered for this job and the standard work period; change the STD HRS value and the FTE updates to the accurate number.

<u>Full/Part selection of REQUIRES these STD HRS & FTE amounts:</u>

When you select Full/Part Status of:	Standard Hours Should Be:	FTE Should Be: (Calculates based on STD Hrs entered)
Full-Time	40.00	1.000000
Half-Time	20.00	0.500000
Less than Half-Time	19.99 or less (<20.00)	0.499800 or less
Temporary Employee: Less than Half-Time	Any Amount, whatever they are working. 00.01 to 40.00	0.000001 to 1.000000
More Than Half-Time	20.01 or higher (>20.00)	0.500300 or higher
Seasonal	40.00 or whatever hours they were hired to work per week.	1.000000 or whatever it calculates out to based on STD HRS entered.

<u>Contract Number Section of Job Information Tab:</u>

- ***Contact Number:*** LEAVE ALONE; we do not use this field.

<u>USA FLAG Section of Job Information Tab:</u>

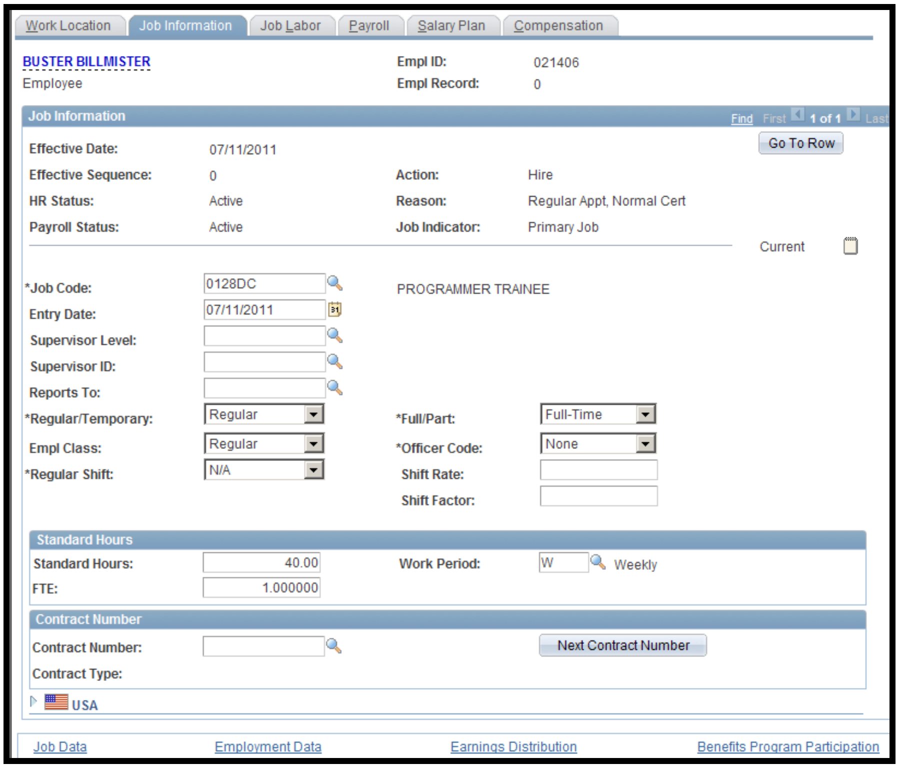
At the bottom of the Job Information tab, click on the arrow next to the USA flag to expand this section.


USA
*FLSA Status: Nonexempt
Work Day Hours:
*EEO Class: None

- ***FLSA Status:*** Defaults based on Job Code entered on this page (or from the Position ID# data when it's used). Do not override this default unless instructed to by DER; if the value seems incorrect contact the Compensation section of DER.
  - Note about FLSA Statuses: In the new Salary Grade structure, salary grades that end with an N are FLSA Nonexempt, salary grades that end with an X are FLSA Exempt.
  - FLSA Status Nonexempt means they are not exempt from FLSA.
  - FLSA Status of anything other than Nonexempt means that they are FLSA Exempt.
- ***EEO Class:*** LEAVE ALONE, whatever defaults here is the correct value. This field will default to None, which means it is included in EEO reporting.

When you are finished entering data on the Job Information tab, it should look similar to the example below.

- **<u>Click on the Job Labor tab</u>** when you have finished entering data on this tab.



Job Labor

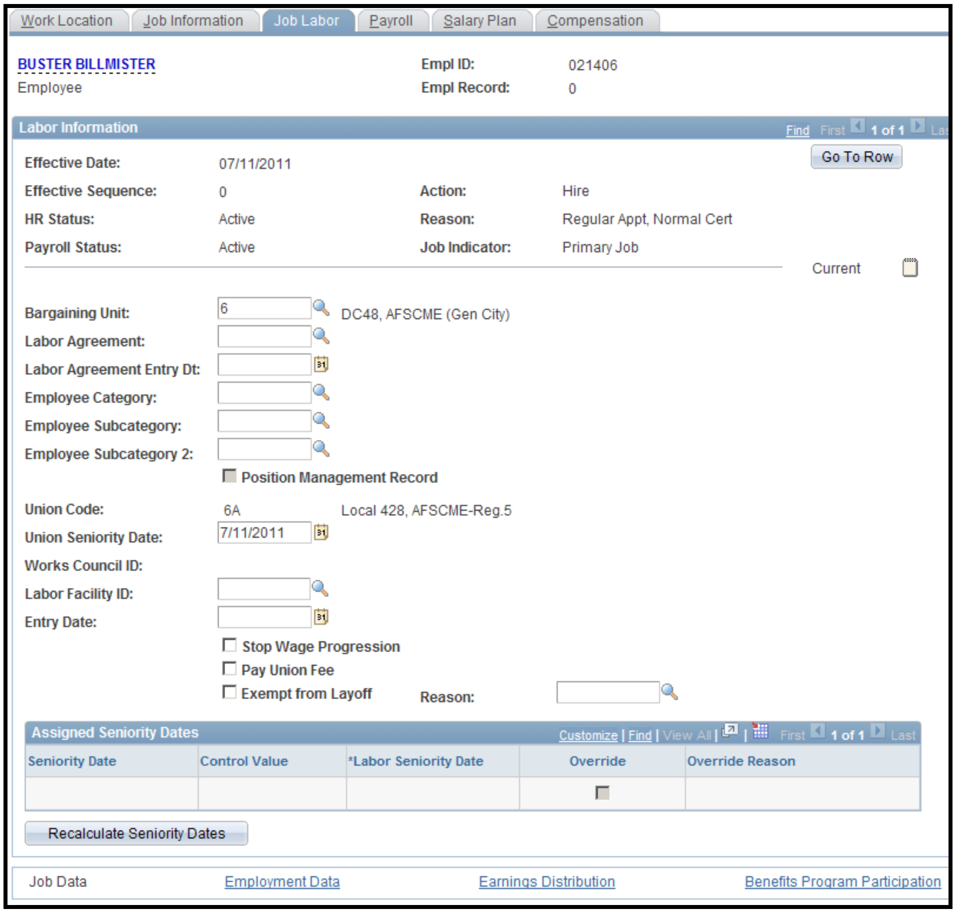
This page maintains the employee's Union Info/Labor/Employee Group. The **ONLY** fields you will complete on this page are Bargaining Unit, Union Code and Union Seniority Date. Do not enter data into any other field on this page.

Job Labor REQUIRED fields are (If the field isn't mentioned here leave the field alone)**:**

- ***Bargaining Unit***: Enter correct bargaining unit based on employee's current Union/Employee group for the job they are now in (use looking glass to lookup code and make selection if needed).
    - ***This must be changed each time they change Union/Employee Groups*** – it does NOT automatically default.
- ***Union Code (UC#):*** Enter the Correct Union Code #, use the looking glass to look it up if you need to. A value may default in – if it's DC48/AFSCME make sure it's correct
    - DC48/AFSCME has quite a few locals, each one has their own Union Code, make sure you are selecting the correct one for that position in your department. If you are unsure which it is contact DER Labor relations for assistance.
- ***Union Seniority Date***: In this case it MUST be the New Hires Start Date (Effective Date of Hire entry).
    - This date does NOT automatically update, you must change it each time the Union Code changes (Remember to change the Bargaining Unit at that time as well).

When you are finished entering data on the Job Labor tab, it should look similar to the example below.

- **Click on the Payroll tab** when you have finished entering/verifying data on this tab.



Payroll

The Payroll tab designates the employees' specific payroll information/settings. This page designates things like how they are set up in City Time (DPW Time Entry), the Pay Group they are in (General City, Fire, Police, or Ballot Clerks), and tax settings.

<u>Payroll Tab REQUIRED fields are</u> – All of which will be populated:

- ***Payroll System:*** LEAVE ALONE; Defaults as Payroll for North America. This is the correct value.
- ***Pay Group****:* The Value defaults to GEN for General city, if you are hiring to the Police Department, Fire department, or a Ballot clerk then you need to update this with the correct value as explained below.
  - GEN is for General City, Fire is for Fire Department, POL is for Police Department, and BLT is for Ballot Clerk (Election Inspector and Chief job titles).
- ***Employee Type:*** Exception Hourly (E) or Hourly (H) for <u>Time Entry Purposes</u>
  - *<u>Employee Type Exception or Hourly Pointers/FYI's:</u>*
    - H (Hourly) designation: All FLSA nonexempt (Pay Grades ending with an N in the Salary Ordinance) Job Titles are supposed to be designated as hourly. Anyone who may earn overtime

MUST be designated as hourly. Employees who charge time to a grant/reimbursable account MUST be hourly. Employees who charge varying account codes all the time should be hourly, this could mean employees with different work assignments each week. FLSA EXEMPT (Pay Grades ending in an X in the Salary Ordinance) and any other classification <u>can</u> be hourly if needed..

  - The employee must be designated as Hourly to be able to record overtime in Time Entry. This goes for both Comp Time earned and paid overtime.

- E (Exception Hourly) designation: FLSA Exempt employees can be Exception Hourly. Employees who do not get different assignments each week or day therefore usually charge the same account codes and % of hours to each every pay period. A good example of this could be employees who hold higher level management or technical/professional positions that use the same account codes regularly.

  - If you choose this designation then you MUST enter earnings distribution (by percent ONLY) on the Earnings Distribution Hyperlink on the bottom of the page.

- ***Holiday Schedule****:* This directly relates to the Employee Type entered. NONE for NO Holiday and COM to automatically get paid for City Holidays.

  - <u>Employee Type H (Hourly):</u> employees should ALWAYS **have Holiday schedule of NONE** entered and they must record all city holidays in City Time to get paid for them (045).

    - These employees would record all time off and time worked.

  - <u>Employee Type E (Exception Hourly</u>): If it's a regular benefited city employee, they should have a **holiday schedule of COM** so their city holidays automatically get paid. If it's a temporary (non regular) and/or non-benefited city employee, they should have a Holiday schedule of NONE so they don't get paid for city holidays.

    - These employees would only record "Exceptions" to their normal work time. Time off and unpaid time are the general ones. Holiday pay is automatically recorded.

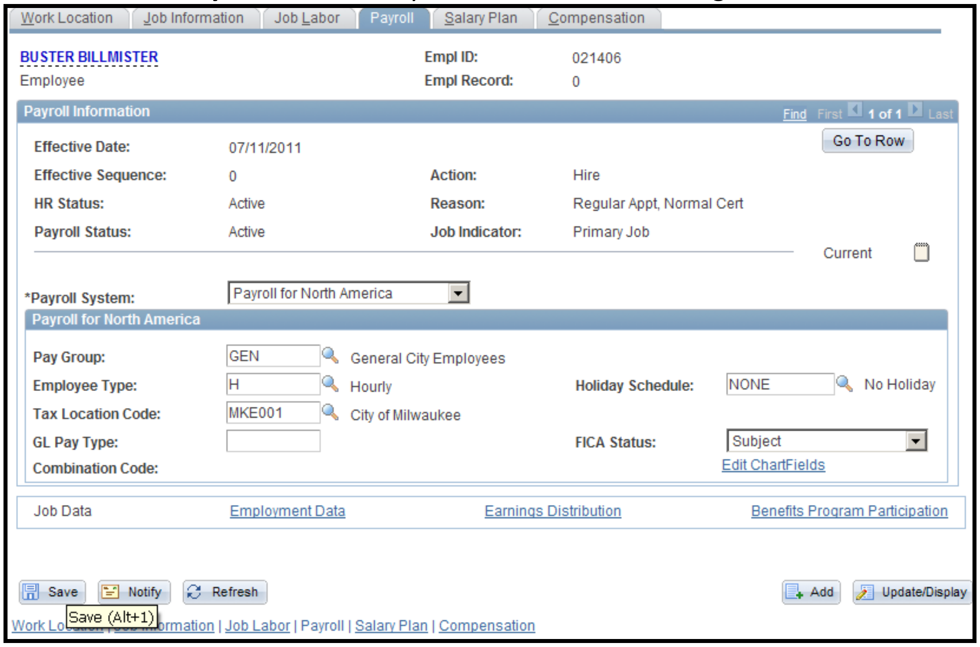
- ***Tax Location Code:*** LEAVE ALONE; Defaults as MKE001, this is the correct value.

- ***FICA Status****:* LEAVE ALONE; Defaults to Subject. Do not override this default unless instructed to by the Employees' Retirement System (ERS) or the Comptroller's office.

- ***GL Pay Type:*** LEAVE ALONE; we do not use this field.

When finished entering data on the Payroll tab, it should look similar to the example above.

- Click on the **Salary Plan** tab when you have finished entering data on this tab.



Salary Plan

The Salary Plan tab shows where the employee's Compensation Rate is coming from as well as tracking when the employee went into the Salary/Pay Grade (Grade) and the date of their last non ordinal increase (Step Entry Date). The correct **Salary Administration Plan** and **Grade** field values are defaulted in based on the Job Code entered. The field for Step usually defaults to step 1 or sometimes isn't populated. The Grade Entry Date and Step Entry Date must be the employee's date of hire in this case. Review this information for accuracy. The **Salary Plan Tab** Fields explained:

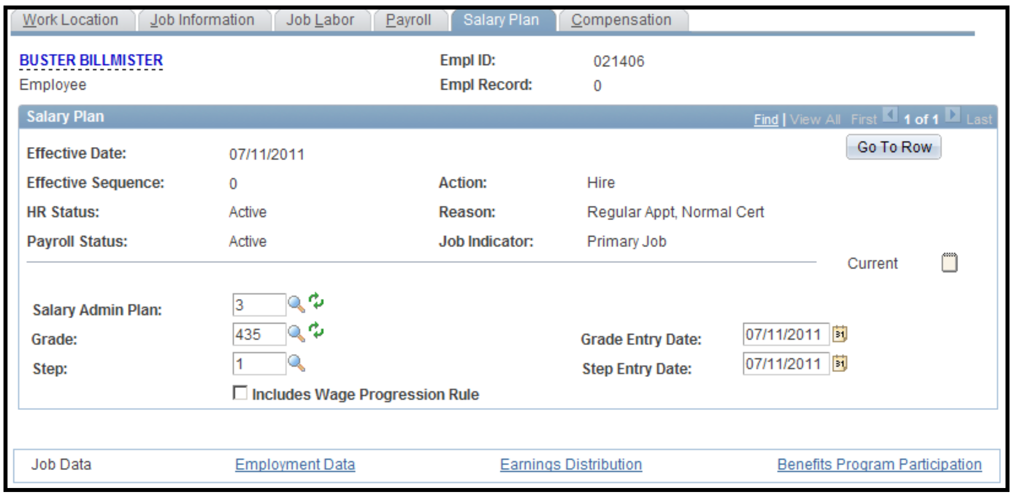
- **Sal Admin Plan (SAP):** LEAVE ALONE; defaults from the Job Code entered. This is the Union/Employee group that the Compensation Rate is pulled from. Each Union/Employee group has it's own SAP# and a Pay Grade is created under each SAP# for each Union/Employee group that it exists in.
- **Grade (AKA Pay Grade or Salary Grade):** LEAVE ALONE; defaults from the Job Code entered. This is the Pay Grade in which the employee's Compensation rate is pulled from. Most of the Pay Grades shown in HRMS are currently from our old Salary Ordinance numbering system, by the end of 2014 we plan to be converted to the new Salary Ordinance numbering system.
- **Step:** When a Job Code is entered a Step Value will default; either 1 or it'll be blank. LEAVE THIS ALONE FOR NOW.
- **GRADE ENTRY DATE:** In this case it MUST be the New Hires Start Date (Effective Date of Hire entry).
    - In a normal situation this date will default to the effective date of the Job Data row whenever the Pay Grade is changed; this would happen when a JC# is changed that is in a different Pay Grade (automatically updates each time the JC# changes).
- **Step Entry Date:** In this case it MUST be the New Hires Start Date (Effective Date of Hire entry).
    - In a normal situation this date will default to the effective date of the Job Data row whenever the Pay Grade is changed just like the Grade Entry date above. You would also manually change the

Step Entry Date each time the employee receives a Pay Increase to that date (anything other than an Ordinal Increase) while in this Job title. Consider this the **Salary Anniversary Date.**

- This date auto updates in the same way the Grade Entry Date does, but you must remember to manually maintain it as well when necessary as explained in the Step Entry Date details.

When you are finished reviewing/editing data on the **Salary Plan** tab, it should look similar to the example below.

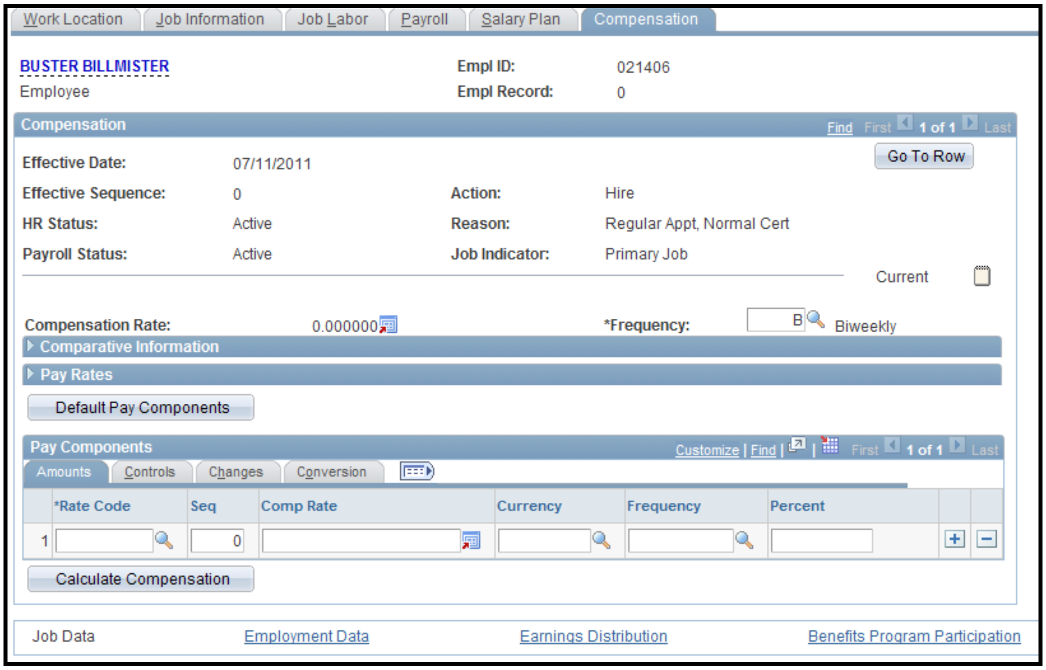
- **Click on the Compensation tab** when you have finished reviewing/editing the data on this tab.



Compensation

The **Compensation** Tab details the employee's pay rate information in various calculations, their current Compensation Rate, if their Compensation Rate is bi-weekly or hourly, and Comparative Information when applicable.

When you first click on the **Compensation** tab, you will see that the system has not yet assigned a rate of pay for the new employee as shown below. There are 2 ways to populate pay rate information. Either Default it from the Compensation Tables (Default Pay Components Button) or enter a Manual Rate of Pay (and Click Calculate Compensation Button).


Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation
BUSTER BILLMISTER
Employee
Empl ID: 021406
Empl Record: 0
Compensation
Find First 1 of 1 Last
Go To Row
Effective Date: 07/11/2011
Effective Sequence: 0
Action: Hire
HR Status: Active
Reason: Regular Appt, Normal Cert
Payroll Status: Active
Job Indicator: Primary Job
Current
Compensation Rate: 0.000000
*Frequency: B Biweekly
Comparative Information
Pay Rates
Default Pay Components
Pay Components
Customize | Find | First 1 of 1 Last
Amounts
Controls
Changes
Conversion
*Rate Code
Seq
Comp Rate
Currency
Frequency
Percent
1
0
Calculate Compensation
Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

<u>**FIRST:**</u> **Bi-Weekly or Hourly Pay?:** A department/payroll person can't choose if they want to set up an employee as Bi-Weekly or Hourly for their Compensation information. A Pay Grade under a Salary Administration Plan is set up as either Bi-Weekly or Hourly and the Compensation Rate info must be setup that way as well. Very few pay grades are setup as Hourly.

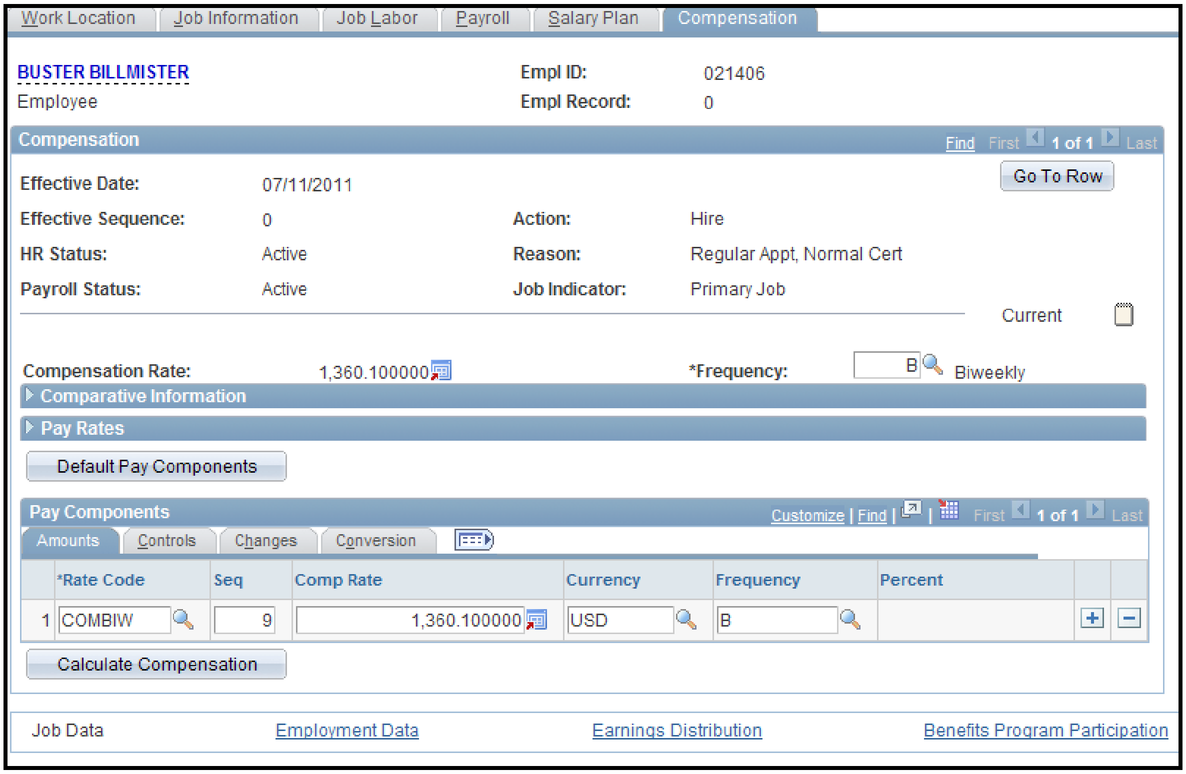
- <u>You can tell if a pay rate must be hourly or bi-weekly when you Default the pay</u> (as you should try first below); the Comp Rate would show up as Hourly. If this happens you must keep the rate as hourly whether it's defaulted in or you enter it manually. **Manual Hourly rate of pay calculations are explained in the Manual rate of pay instructions below.**
- <u>There are 3 fields on the Compensation tab that designate a rate of pay as Bi-Weekly or Hourly</u>, the values of all 3 fields must point to whichever rate type the pay grade requires. Not all of them automatically change. The default values are always for Bi-Weekly.
    - If an employee's rate of pay should be HOURLY, these 3 fields on the Compensation tab must be setup with the Hourly values. Some might retain the Bi-Weekly values they auto default to. **HOURLY Values should be: Frequency** (Middle Right)**:** H (Hourly), **Rate Code:** COMHR, **Frequency** (Bottom Right): H (Hourly)
- <u>**Note:**</u> Hourly rates of pay have the same rate for both the Comp Rate and the Compensation Rate because their hourly rate is what they get paid per hour no matter how many hours they work. Hourly employee's full/part status is irrelevant.

<u>**Defaulting the pay from the Compensation Tables** (Default Pay Components Button)**:**</u>

1. Always try this first before entering a manual rate of pay, if the correct rate of pay defaults in GREAT. If not, follow the Manual Rate of Pay Instructions below.
2. This will only work if Step #1 is entered in the Step field on the Salary Plan tab, it cannot be blank.
3. Click on the **Default Pay Components** button, the system will populate both the Compensation Rate (middle of the page) and Comp Rate (bottom middle of the page) fields with the biweekly (or hourly if applicable) rate of pay for the step in the salary grade you indicated on the Salary Plan tab. After clicking on Default Pay Components the Compensation page should look similar to the one that follows.
4. Make sure the Comp Rate & Compensation Rate are correct based on what the Salary Ordinance says, and what the "Certificate of Eligibles and Notice of Appointment" says that you receive from DER.
    a. **Compensation Rate** is a **Calculated Field**, it takes the Comp Rate (Full rate of pay) from the bottom and multiplies it by the employees FTE to give their actual Compensation Rate. This only applies to less than full time (less than 1.0 FTE) bi-weekly rated employees.
    b. **VERIFY THE RATES OF PAY:** If your Department gives you a rate of pay, verify it is correct with the Salary Ordinance. A good example of this is they quote an annual and calculate the bi-weekly, the Salary Ordinance has the official Bi-weekly. You shouldn't be off, not even by a penny. Be sure to look at the footnotes if there are any and use recruitment rates if they exist.
5. If the INCORRECT Comp Rate defaults in then enter the rate of pay manually.
    a. Keep in mind what is stated above about the Compensation Rate being a calculated field. If they are a less than full time employee and their Compensation rate is wrong, figure out what their Full Time/Full Bi-Weekly rate of pay should be and confirm the Comp Rate is correct. This will tell you if it's an incorrect Comp Rate (therefore you need to enter a manual rate of pay) or if it's a calculation error and you should investigate further (maybe the FTE is wrong which means the Standard Hours are wrong).

<u>Entering a Manual Rate of Pay</u> <u>(Calculate Compensation Button)</u>**:**

1. When you enter a Manual Rate of Pay, the Step field on the Salary Plan tab should be blank. If it has a value in it (like the #1), delete it. Be sure the Step Entry Date field stays populated with the Date it had in it.
2. **VERIFY the rate before you enter it:** You would have done this in Step #4 above.
   a. **Hourly Rate entered manually:** First, pull the Hourly rate from the Salary Ordinance if you can. If you must calculate it, take the full bi-weekly and divide by 80. Carry it out to 6 places then round off to 2. Do NOT let excel or your calculator do the rounding for you.
3. On the bottom of the Compensation Tab page, under the section titled Pay Components update/verify these fields:
   a. **Rate Code:** Bi-Weekly rate should be COMBIW, Hourly rate should be COMHR
   b. **Seq:** This pertains to the year that the rate is effective. The last time their Salary Ordinance Rates were updated (Ordinal Increase).
      i. **3/05/14 As of right now (Fire & Police have unsettled contracts):** Seq 13 is for all General City Unions & Employee Groups except Elected Officials and Board Members. Seq 12 is for all Fire & Police Unions as that is when they had their last rate increase (again 2013 and beyond contract is still being worked on).
   c. **Comp Rate:** Full Bi-Weekly rate or Hourly rate with ONLY EVER 2 digits after the decimal place (never round these rates off).
   d. **Currency:** LEAVE ALONE; defaults as USD and this is correct.
   e. **Frequency:** Only values you will ever use and must coincide with value in Rate Code and the other Frequency field in the middle of the page right side section: **B** for Bi-Weekly or **H** for Hourly.
      i. **If it's an Hourly rate make sure all 3 Rate type fields are designated as Hourly (Rate Code and both Frequency fields).**
   f. **Calculate Compensation:** Click the Calculate Compensation Button.

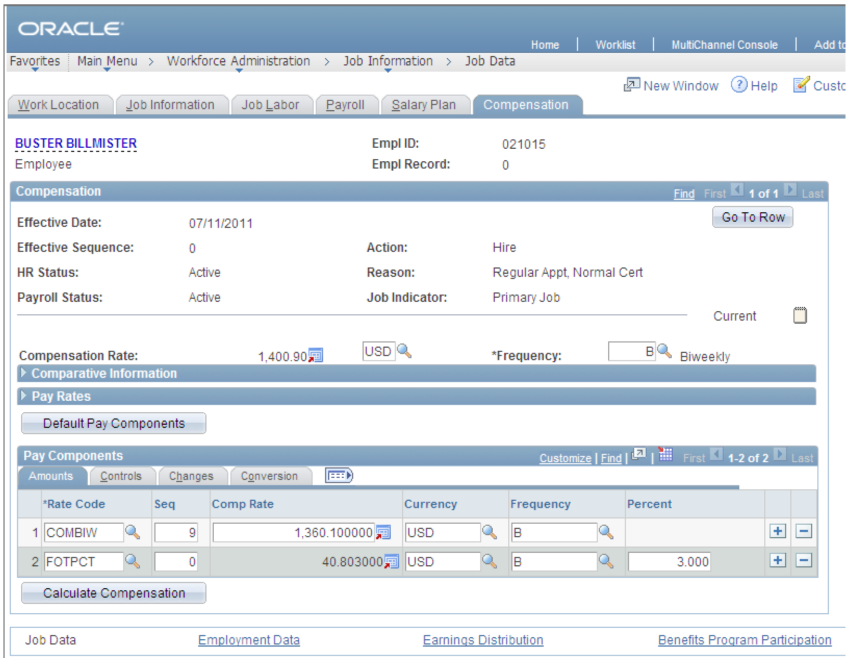


Compensation page fields and information provided:

- ***Frequency*** *(Both middle & bottom right fields):* Required, B/Bi-Weekly or H/Hourly; designates the Comp Rate type.
- ***Rate Code:*** Required, designates the type of rate in the Comp Rate field on that specific Pay Components Row. Required values are either COMBIW (Bi-Weekly Rate) or COMHR (Hourly Rate).
  - ***Footnotes to Comp Rate:*** If the employee has a footnote added to their rate of pay you must insert another row in the pay components section. **Footnotes must be manually deleted when no longer valid.** Footnotes and correct field values are as follows:
    - ***FOTBIW:*** Seq = same # as the rate, Comp Rate = Footnote Rate, Frequency = B.
      - Bi-Weekly Rated employees only, this adds a flat amount to their bi-weekly base and isn't reduced if they have a less than full time FTE.
    - ***FOTHR:*** Seq = same # as the rate, Comp Rate = Footnote Rate, Frequency = H.
      - Hourly Rates only, this adds a flat amount to their Hourly rate and isn't reduced if they have a less than full time FTE.
    - ***FOTPCT:*** Seq = same # as the rate, Frequency: **B or H depending on Comp Rate Type**, Percent = enter % amount not a decimal and I believe we only go 1 decimal place here. The Salary Ordinance details all footnotes.
      - Hourly and Bi-Weekly rates can have percentage footnotes. It adds a percentage increase to whatever their base pay is for hours paid for the pay period.

- ***Seq (Compensation Effective Sequence)***: Required, this correlates with the year the rate became effective.
- ***Comp Rate***: Required, this is the full bi-weekly or hourly rate of the position the employee is filling. It's not reduced if the employee is less than full time.
- ***Compensation Rate***:
  - **Bi-Weekly Rates:** The Compensation Rate is calculated by taking the Comp Rate and multiplying it by the employee's FTE to show their actual bi-weekly rate of pay.
  - **Hourly Rates:** Hourly rates of pay have the same rate for both the Comp Rate and the Compensation Rate because their hourly rate is what they get paid per hour no matter how many hours they work. Hourly employee's full/part status is irrelevant.
  - If the employee has a bi-weekly (B) rate of pay both the Comp & Compensation Rates should display a bi-weekly rate, if they have an hourly (H) rate both rates of pay should display an Hourly rate. If they don't match B to B or H to H then not all 3 rate designation fields on the Compensation Tab are correctly filled in. This is a calculated field and usually matches the Comp Rate.
- ***Comparative Information Section:*** Expanding this section will show rate change information as compared to the previous row (not relevant on a new hire entry).
- ***Pay Rates Section:*** Expanding this section will show employees pay information in Annual, Monthly, Daily, and Hourly.

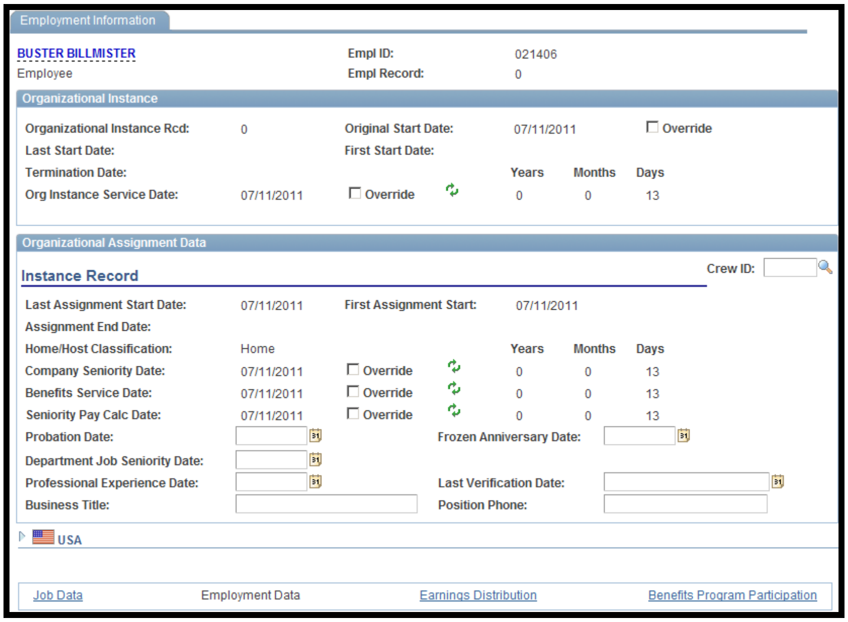
Below is an example of a Compensation tab with a Bi-Weekly rate and a percentage footnote row added.



When you are done entering data on the **Compensation** tab, click on the Employment Data hyperlink at the bottom of the page.

Employment Data

The Employment Data page, this page tracks important major dates about an employee's employment. What is important to notice here is that this page has no arrows to move back and forth between historical rows, this is because this page maintains no history. When you change data on this page it overwrites what was previously there.   If you change a Service Date or Start Date you must document the change in General Comments with what the data used to be, what you changed it to, why it was changed, the actual off payroll dates it was changed because of and the # of those dates you counted to adjust the date by.



The Employment Data page required fields are:

- ***Crew ID***: Required for Online Time Entry; places the employee in a group for time entry.
- ***Probation Date:*** For new hires serving a probation period this date is the same as Hire Date.
- ***Frozen Anniversary Date*** – No longer used except maybe by Fire & Police. The Frozen Anniversary Date is the date that a person completes one full year of service. Often that is one year from the person's start date. It is only used for determining vacation for employees who are **not** on the biweekly vacation accrual system. This field should be left blank and then filled in after the employee completes 1 year of service.
- ***Department-Job Seniority Date*** For new hires this date should be the same as Hire Date.
- ***Professional Experience Date:*** This field will not be used.
- ***Business Title:*** This field is not required.
- ***Last Verification Date***:   This field will not be used
- ***Position Phone***: This field is optional.

Because **“Calculate Status and Dates”** was clicked on the Work Location tab**,** these Fields from the Employment Data page are automatically populated. **(For New Hire Purposes)**

- ***First Start Date***: The system displays the employee Hire Date
- ***Termination Date:*** This field populates when you process a separation
- ***Company Seniority Date:*** Based on the date entered here, the system calculates the number of years, months, and days of seniority for an employee.
- ***Benefits Service Date:*** Based on the date entered here, the system calculates the total years, months, and days of service for an employee.
- ***Sen. Pay Calc Dt***: This field will not be used

Adjust the Benefits Service Date (Leave Date) When Employees Return from Inactive Time on the Payroll

In order for the biweekly vacation accrual system to work properly (to reflect time off payroll), it will be necessary for Payroll Clerks to change the Service Date on the Employment Data page when an employee returns from unpaid time (such as Layoff or Leave of Absence).

At the time you enter a personnel action for Layoff or Unpaid Leave, you will not change the Service Date on the Employment Data page.

However, when you enter the personnel action for return, you will need to change the date.

- If the individual was off for 2 weeks, you will add 14 days to the previous date in the field.
- If the person was off for 3 days, such as for a ~~suspension~~, you would add 3 days to the Service Date.
- If the person was on leave for one year, you would add one year to the date, and so on.

When you process returns, you will really be adjusting the Service Date so that the proper number of years of service will be used for vacation accrual purposes.

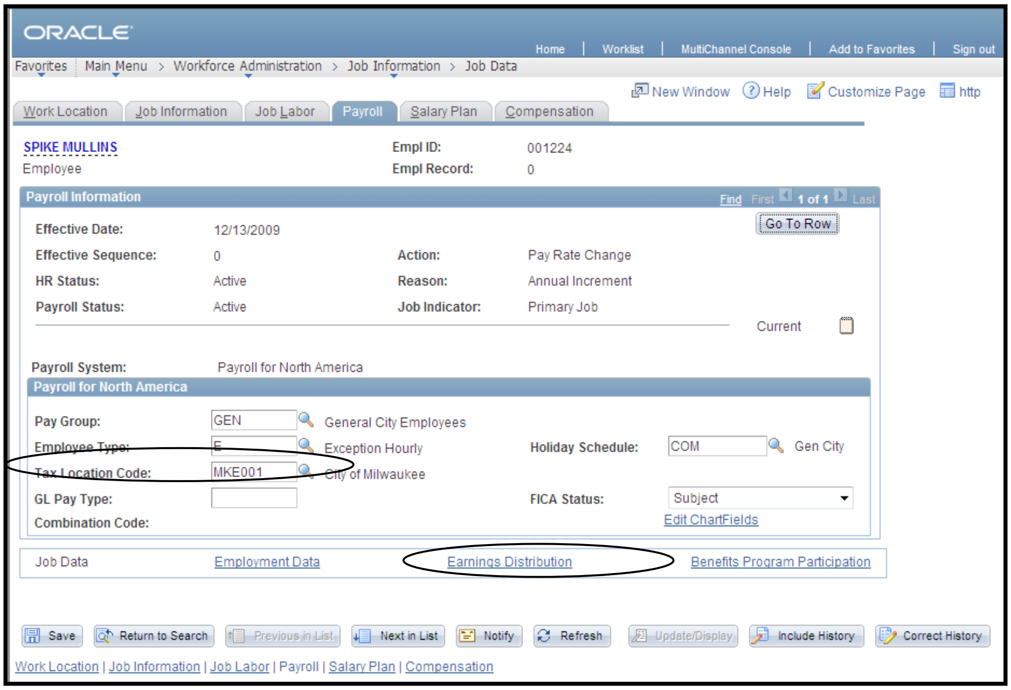
Always update the general comments section in HRMS when you are adjusting an employee's Benefits Service Date (BSD) with a note stating what the previous BSD was, what the new BSD is, how many days you are adjusting it by, and the actual dates that the employee was off payroll unpaid.

Note: You do not adjust the BSD for unpaid time due to a mandatory furlough, any type of unpaid military leave, Paid or Unpaid Employee Suspensions, and Wisconsin disaster management assistance team (WDMAT).

Questions about this issue may be referred to the DER-Certification & Salary Services, Pay Services Section.

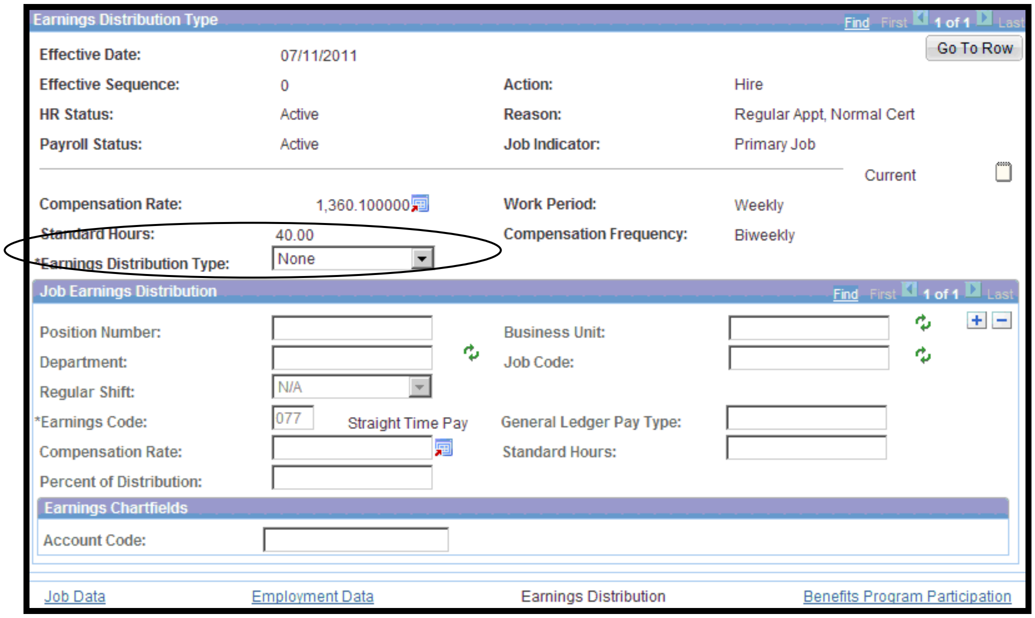
- ## Job Earnings Distribution

  In Job Earnings Distribution you can distribute the employee's compensation to different departments, job codes, or account codes. You should not use this page to distribute special earnings such as holiday pay or bonuses. This page is used for Exception Hourly employees.



On the **Earnings Distribution Page,** Notice that ***<u>Earnings Distribution Type</u>** defaults to None (For New Hires). This indicates that the employee's job pay is treated as regular earnings and is calculated and charged according to the information listed in Job Data and in Time Entry.

- Change the type to "by percent" if your employee is exception hourly.
- **Note:** The City is <u>NOT</u> using the **By Amount** or **By Hours** Earnings Distribution Types.


Earnings Distribution Type
Find First 1 of 1 Last
Go To Row
Effective Date: 07/11/2011
Effective Sequence: 0
Action: Hire
HR Status: Active
Reason: Regular Appt, Normal Cert
Payroll Status: Active
Job Indicator: Primary Job
Current
Compensation Rate: 1,360.100000
Work Period: Weekly
Standard Hours: 40.00
Compensation Frequency: Biweekly
*Earnings Distribution Type: None
Job Earnings Distribution
Find First 1 of 1 Last
Position Number:
Business Unit:
Department:
Job Code:
Regular Shift: N/A
*Earnings Code: 077 Straight Time Pay
General Ledger Pay Type:
Compensation Rate:
Standard Hours:
Percent of Distribution:
Earnings Chartfields
Account Code:
Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

The Job Earnings Distribution page <u>REQUIRED</u> fields are <u>(ONLY THOSE LISTED)</u>:

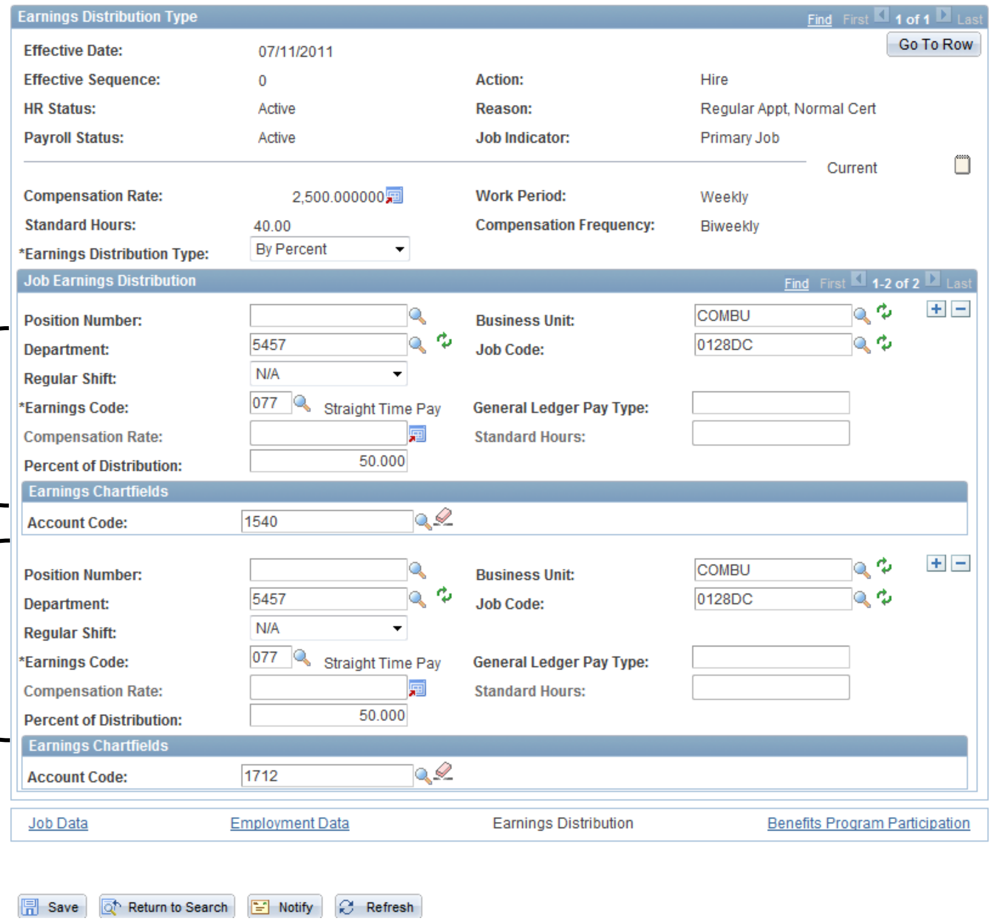
- **Earnings Distribution Type***:*
  - **By Percent** if your employee is exception hourly.
  - **None** if your employee is hourly
- **Department ID**
- **Job code**
- **Distribution percentage**
  - If multiple rows of Job Earnings distributions are entered/multiple account codes are used, the percentages charges must total 100%.
- **Account Code**
- **Earn Code (077 – Always)**
  - Remember, the sum of the percentages in the distribution lines must equal 100. To insert additional Percent lines, click the icon.
- **<u>Important Note:</u>** You should not enter any data into the Position Number, General Ledger Pay Type, or other fields not listed above..

An example of a completed Job Earnings Distribution page with the earnings distributed to two departments at 50% each is shown.

If you wish to, say, change an employee's job earnings distribution to 50/50, you would type over the values in the first row and then use the Insert Row button to add the second distribution line.

NOTE: This is one distribution line.

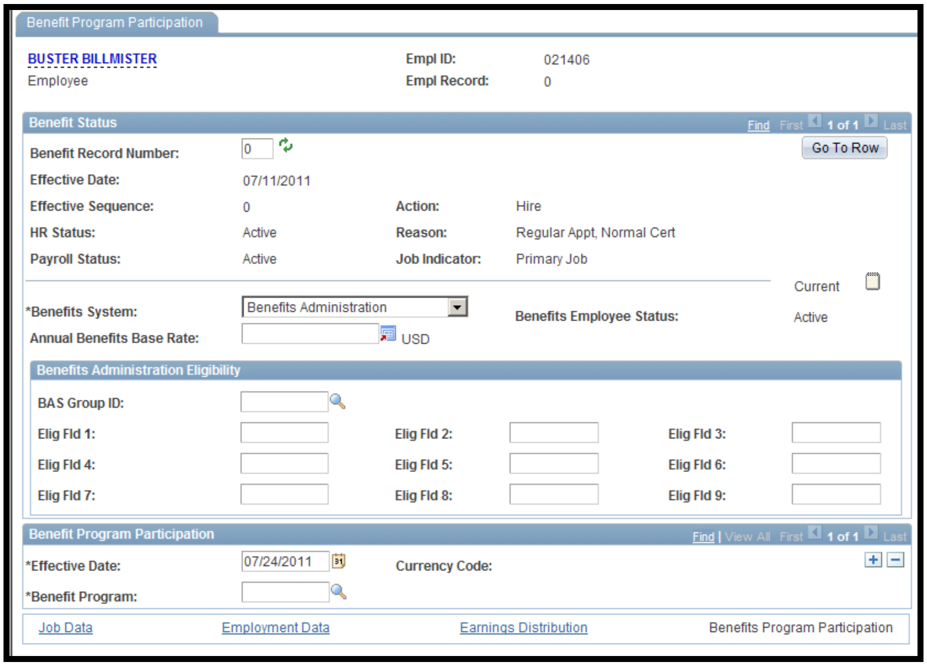
NOTE: This is one distribution line.



Benefit Program Participation

Next click on the Benefits Program Participation hyperlink at the bottom of the page. You use the Benefit Program Participation page to specify the benefit program in which the employee is enrolled.

Note: After the employee has been hired, you can let the automated Ben Admin process maintain the **Benefit Program** field for future events (when you enter future job data rows).



<u>The Benefit Program Participation page required fields are:</u>

- ***Benefits System:*** Must default to Benefits Administration.

<u>Benefit Program Participation Section:</u>

- ***Effective Date***: For the purposes of HIRE, use the date first worked – the same effective date as the job record. Otherwise it's the effective date they went into a different "union/employee" group association.
  - **Note:** This date always defaults to the date you are entering the entry on (Current date), be sure to change it to the correct effective date of the job data row.
- ***Benefit Program:*** The Benefit Program (Plan #) is based on the employee's representation status or bargaining unit (and department in some cases).

<u>Understanding other fields on this page:</u>

- ***Annual Benefits Base Rate:*** Do not maintain this, unless asked to do so by a person from the DER-Employee Benefits staff.

- ***BAS Group ID & Elig Flds 1-9:*** Maintained by Employee Benefits in DER. Payroll Clerks should not maintain these fields unless asked to do so by a person from DER-Employee Benefits.

After you have entered this information, click on the OK button to save all Hire pages.

- You may get a message box that tells you that you haven't defaulted the Compensation, this can happen when you enter a manual rate of pay vs. defaulting the pay from the compensation tables (clicking default compensation).
- **After a SUCCESSFUL SAVE** of a New Hire entry, you are returned to the **Organizational Relationship** Tab where you added the employee.

Entering Employee Job or Assignment Information by Position ID

Position Management, the Concept

In 2009 the City began using a tool in PeopleSoft called Position Control; Position ID Numbers are Key in Position Control. Position Control is a function to help departments and the Budget office quickly assess which of a department's positions are filled, and at what level.

- There is a separate data base containing all City positions, each position has a number.
- When you enter a position number into your employee's Job Data, you are connecting that employee to a position.

There is an important distinction to understand between an employee's **job code vs. their position number**. The job code indicates the job the employee is actually working, whereas the position number indicates the budgeted position authority an employee is filling.

- For example, your new hire might an Office Assistant I, so you enter the OAI job code on his record. However, he may be filling Office Assistant III position authority, so his position number will be that of an OAIII.

A Few notes about Hiring by Position Number:

About this section of the book: The Hiring by Position ID Number section of this book mainly emphasizes on the differences and what is Important to know when entering a new hire transaction with a Position Number vs. the previous section of hiring by Job Code.

- Using a **Position ID Number** has an impact on how only some of the data is entered and reviewed on mainly 3 tabs in Job Data; they are the Work Location tab, Job Information Tab, and Job Labor tab. This is what's covered in better detail in this section; the rest is a brief overview of what to look at.
- For complete details, field explanation, what is expected, requirements, and what is required on all of the Personal Data tabs see the **Hire by Job Code** section.

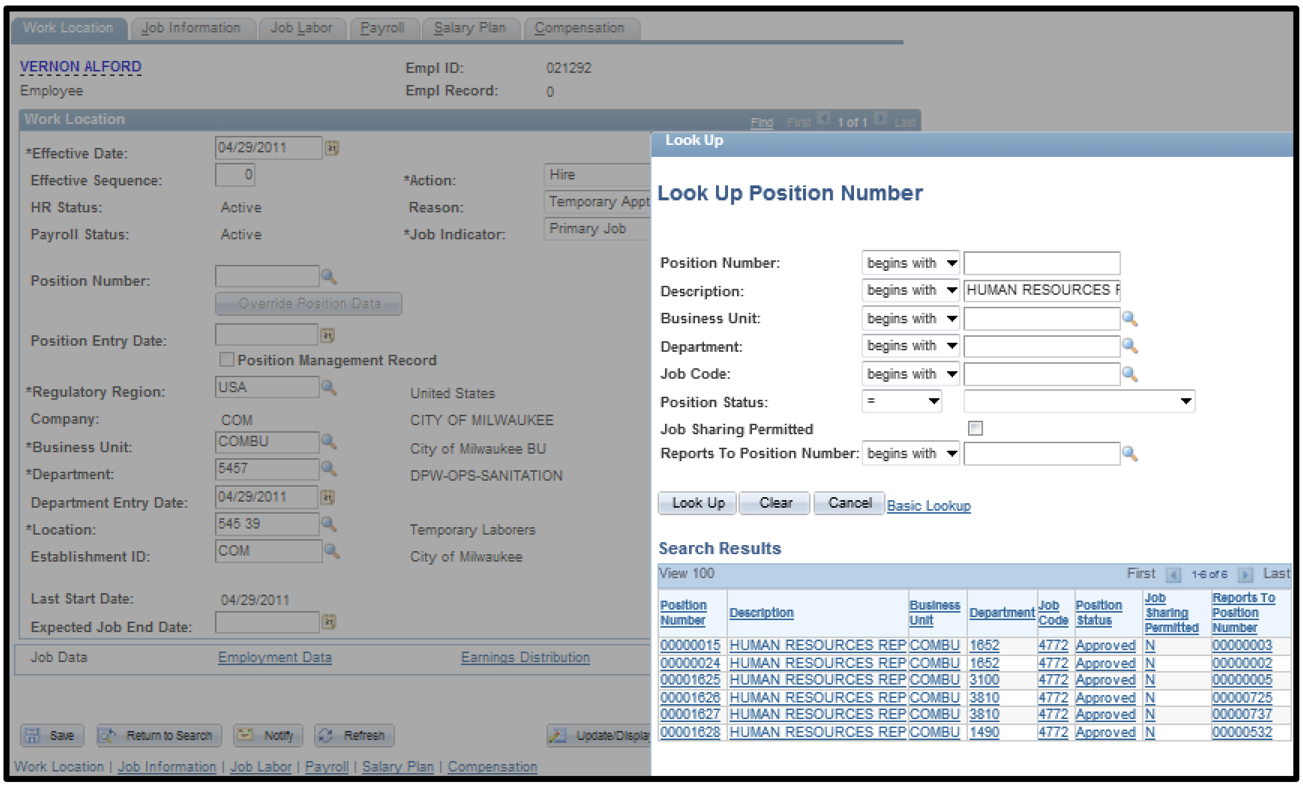
NOTE: it's important to pick and utilize the correct position number. Often multiple position numbers exist for the same job title within your department, maybe even the same location number – you need to be sure to pick the correct one.

Position ID Numbers: Before you make the entry in HRMS for Hire, Rehire, or any other job data transaction where you need to use a Position ID Number, it is best that you know what that number is first. There are 3 ways to do that in order of easiest and best first:

- **Position Management Table:** You can go right to the Add/Update Position Info table in position Management and look up the position info. This is the best option as you can only see Positions for your department, and can view the details of the position to ensure you pick the correct one like the Location Code, who it reports to, the number of incumbents, if it's Regular or Temporary, Full/Part status, Union Code, and other helpful details.
    - **Path:** Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

- **Hourglass next to Position Number field on Work Location Tab in Job Data (Example on Next Pg):** Here you can lookup Position ID Numbers; you need to type in a Job Code or you can type the job title in the Description box. The problems here are #1 will allow you to see all city departments positions with this job title/code, & #2 you cannot see the details of the position that you can see on the position table itself to know you are picking the correct one.
- **Look at the previous Incumbent for their Position**: Not the best way as the record could be wrong.

Screenshot of Looking up a Position Number by using the Hourglass on the Work Location Tab:



Position numbers differ by two fields: “reports to” and “location”, both fields are set up behind the scenes and do not require any maintenance of you. The “reports to” field indicates the position that your new hire reports to, and “location” indicates where your employee works.

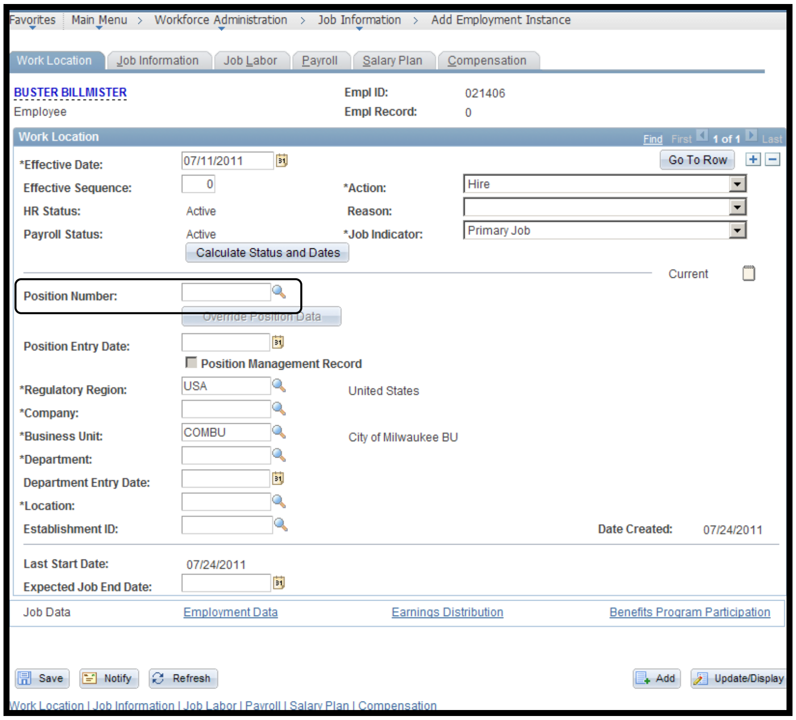
The example above shows:

- 6 Positions of Human Resources Rep
- 4 different Departments

For the purpose of this example we are looking for the Human Resources Rep position in department 1652 that reports to Position Number 00000002 which would be position number 00000024.

Work Location

The first page in the Job Data component, Work Location, is where you indicate that you are hiring the employee. The Position ID # is entered on the Work Location Tab.



On the Work Location Tab enter the following:

- Click the **Calculate Status and Date** Button
- ***Effective Date***: Must be new employee's first day on the job.
- ***Action***: HIRE (Hire for all New Hire Entries, Rehire for all Rehire entries)
- ***Reason***: Select the appropriate Reason based on the appointment type
- ***Job Indicator:*** Primary on Empl Record 0 when hiring new Employee
- ***Position Number:*** This full 8 digit number is required now by most city departments
- ***Position Entry Date***: Auto populates to the date the employee went into the Position Number

These Fields will Auto Populate from the Position Number, Verify their contents:

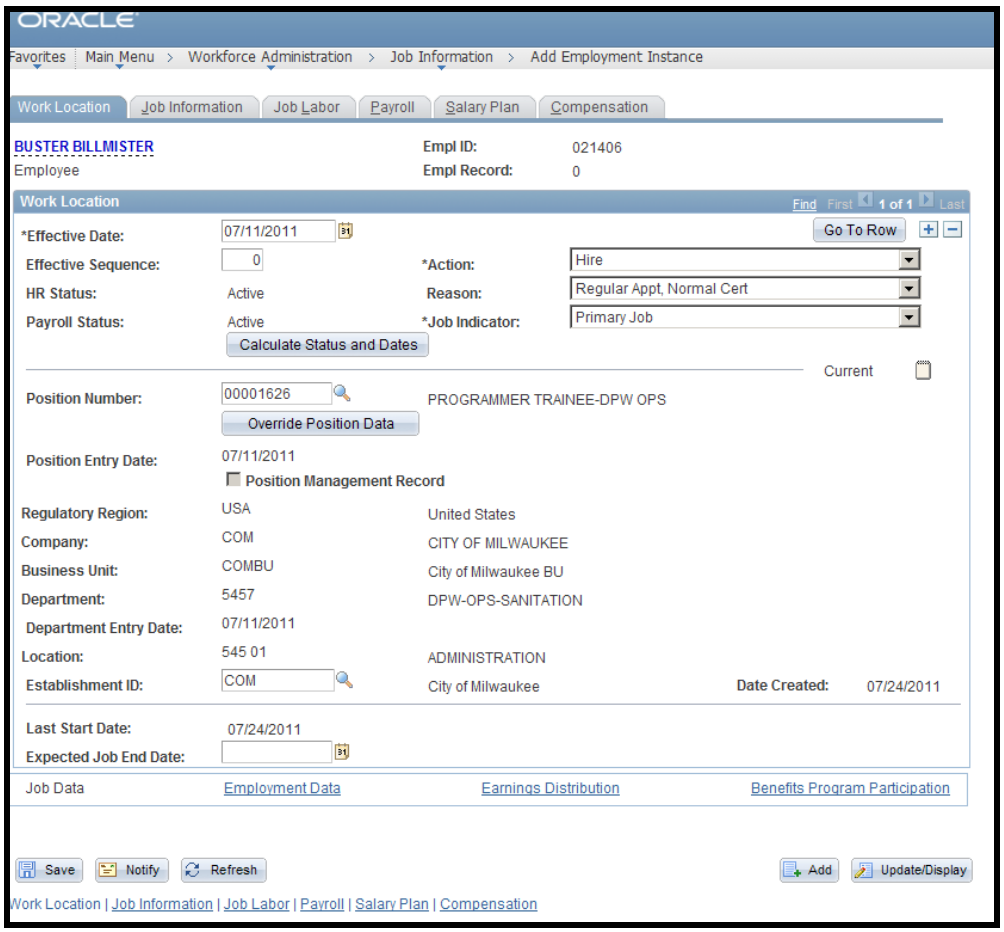
- ***Company:*** COM (Always)
- ***Department***
- ***Department Entry Date:*** Date employee went into Department #, in this case effective date of Hire.
- ***Location***

If any of those are incorrect, click back on the Work Location tab, Click on the Override Position Data button and change the data in those fields to what it should be.

- **However, what is better to do is contact your Budget person, have the position data corrected, then make the HRMS entries using the correct position data instead of overriding the position data because of incorrect data.**

When you enter a position number, the title of the position populates next to the number field. A number of other fields automatically populate as well. You can see from below that entering position number 00001626 populated a number of fields on the Work Location tab. With so much information populating automatically, you need to carefully check all tabs in Job Data to make sure that your employee's information is correct.

When you've finished entering the data on the Work Location tab, it should look similar to the example below. Notice that quite a bit of the required information has been filled in for you after you typed in the Position ID Number.



Once you have verified the information on this page, click the Job Information tab.

Job Information

As shown below, In the Job Information tab most of the required information is automatically populated due to the usage of the position number. Verify that the information entered is correct.

The only field that needs to be entered on this tab is:

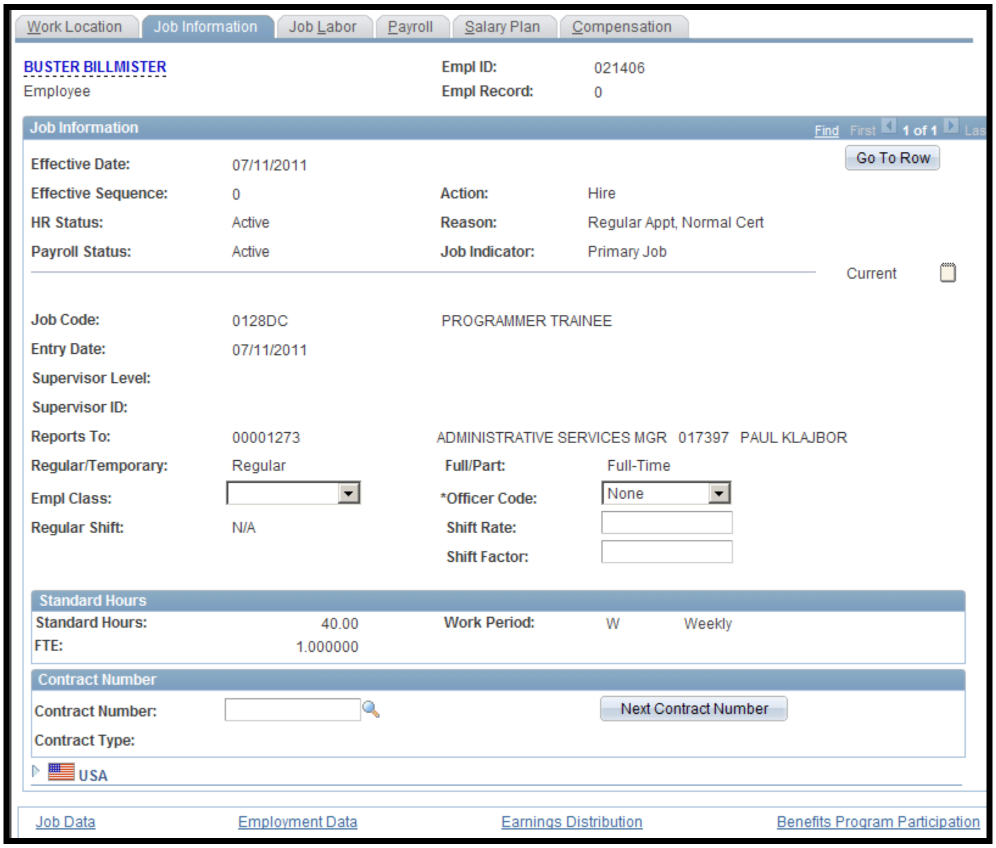
- **Empl Class**

Verify the accuracy of these fields:

- Job Entry Date
- Regular/Temporary
- Full/Part
- Standard Hours/FTE
  - If any of those are incorrect, click back on the Work Location tab, Click on the Override Position Data button and change the data in those fields to what it should be.

Underfill Situation: If an employee is hired into a position using a higher level position authority but hired into a lower level position, this is an underfill situation. A good example of this is if they are hired as an Office Assistant I, underfilling as an Office Assistant III.

- Enter them into the higher level Position Number
- Click Override Position Data on the Work Location Tab
- Enter the Job Code they are filling the position as on the Job Information tab.
  - Once the employee completes the requirements of the Underfill and DER approves, you will enter a promotion after underfill row in Job Data. Then click the Use Position data button to use the position data and they will default to the job code tied to the position.


Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation
BUSTER BILLMISTER
Employee
Empl ID: 021406
Empl Record: 0
Job Information
Find First 1 of 1 Last
Go To Row
Effective Date: 07/11/2011
Effective Sequence: 0
Action: Hire
HR Status: Active
Reason: Regular Appt, Normal Cert
Payroll Status: Active
Job Indicator: Primary Job
Current
Job Code: 0128DC PROGRAMMER TRAINEE
Entry Date: 07/11/2011
Supervisor Level:
Supervisor ID:
Reports To: 00001273 ADMINISTRATIVE SERVICES MGR 017397 PAUL KLAJBOR
Regular/Temporary: Regular
Full/Part: Full-Time
Empl Class:
*Officer Code: None
Regular Shift: N/A
Shift Rate:
Shift Factor:
Standard Hours
Standard Hours: 40.00
Work Period: W Weekly
FTE: 1.000000
Contract Number
Contract Number:
Next Contract Number
Contract Type:
USA
Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

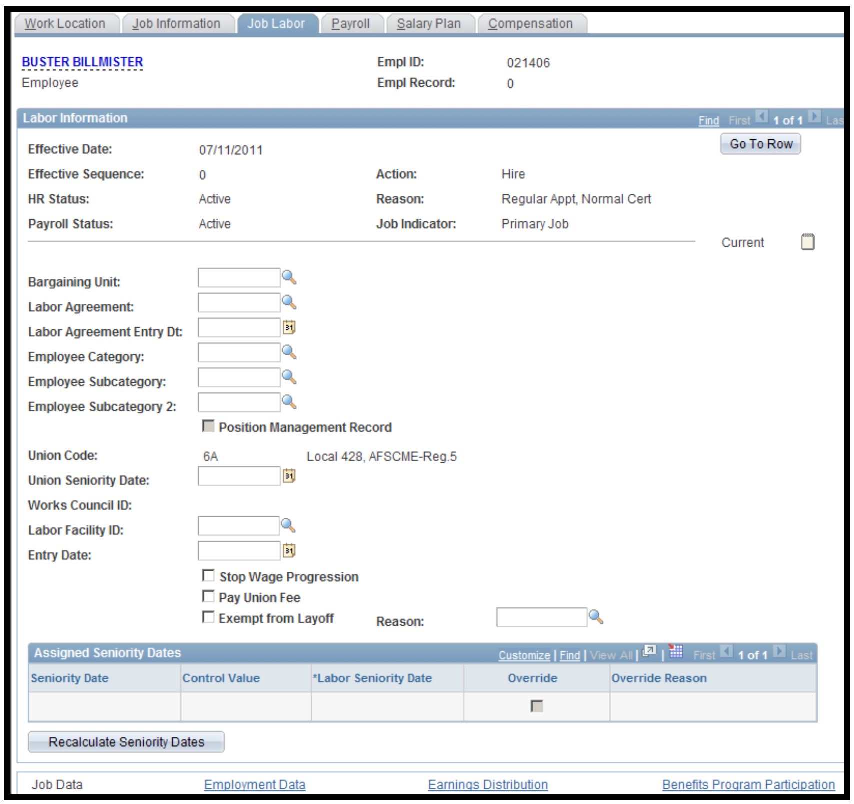
Job Labor

The Union code field defaults from the position number. The only fields you will complete on this page are listed below, the union code defaults from the position number.

- Bargaining Unit
- Union Seniority Date – The date the employee went into that Union Code

<u>If the Union Code is incorrect,</u> click back on the Work Location tab, Click on the Override Position Data button and change the data to what it should be.

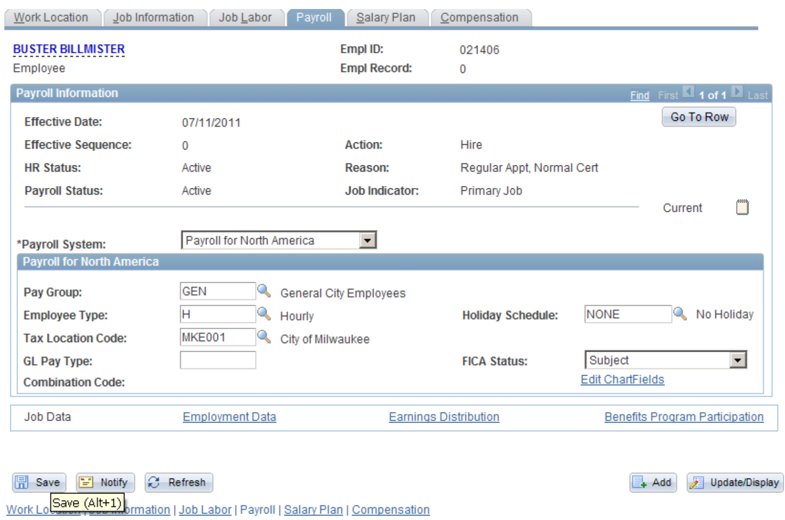
Below is what this page looks like when data is defaulted from the Position Number <u>BEFORE</u> you fill in the remaining required fields.



➢ **<u>At this point the rest of the hire by Position Number process is exactly like the hire by job code process.</u>** You can refer to those instructions if you like for better more complete detail then the pages that follow.

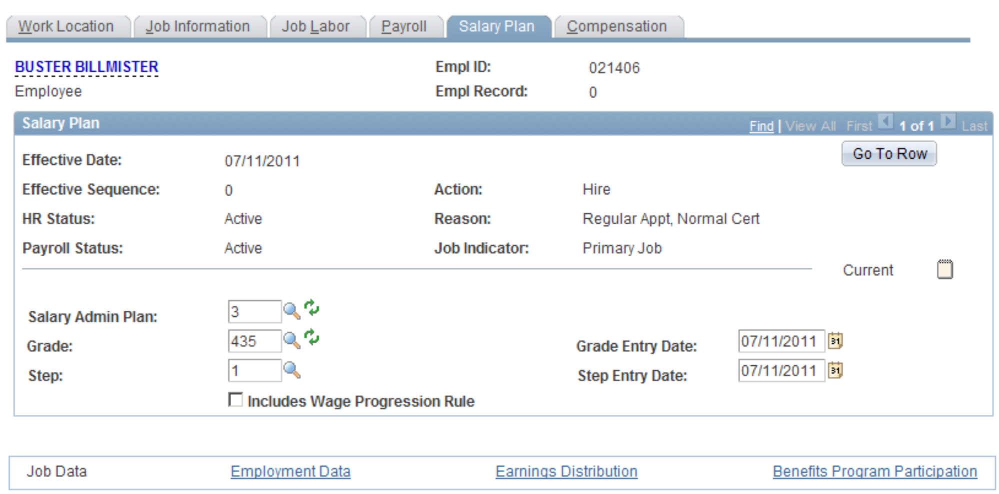
Payroll

There is no need to make any entries/changes on the payroll tab unless the employee is exception hourly or is to go into a different Pay Group. See Hire by Job Code instructions for better detail if needed.



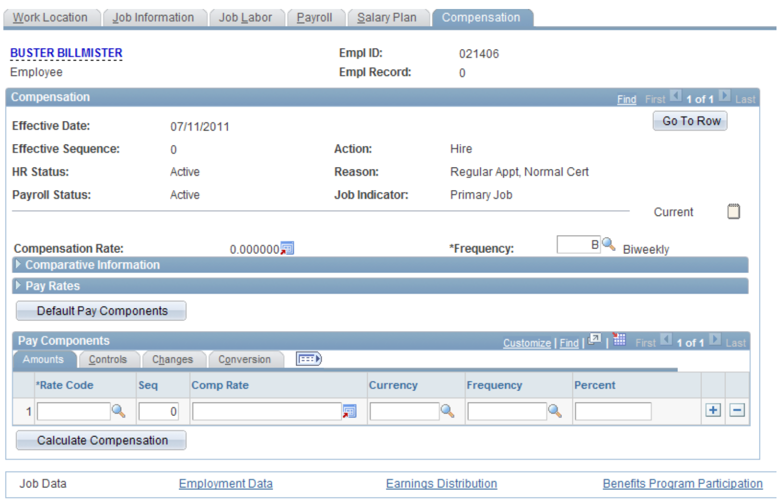
Salary Plan

There is no need to make any entries or changes on the Salary Plan tab unless the new employee is being hired in at a higher step #.

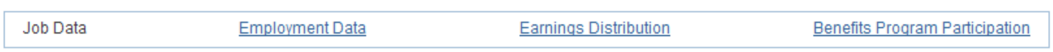


Compensation

Click the Default Pay Components button on the compensation tab to populate the compensation rate or enter a manual rate of pay, .



The remaining Job Data pages should be completed exactly as explained previously when hiring by job code.



Employment Data Required Fields:

- *Crew ID* Required for Online Time Entry; places the employee in a group for time entry.
- *Probation Date* For new hires who will be serving a probation period this date should be the same as Hire Date.
- *Department-Job Seniority Date* For new hires this date should be the same as Hire Date.
- *Position Phone* This field is optional.

Earnings Distribution Required Fields:

- *Earnings Distribution Type:* Notice that *Earnings Distribution Type defaults to None. This indicates that the employee's job pay is treated as regular earnings and is calculated and charged according to the information listed in Job Data and in Time Entry.
  - Change the type to "by percent" if your employee is exception hourly.
  - **Note:** The City is <u>NOT</u> using the **By Amount** or **By Hours** Earnings Distribution Types.
- *Job Earnings Distribution:* If you want to distribute the earnings to different accounts, you can choose to allocate the earnings **By Percent**. After you choose this option, enter the following:
  - Department ID
  - Job code
  - Distribution percentage
  - Account Code
  - Earn Code (077)
    - Remember, the sum of the percentages in the distribution lines must equal 100. To insert additional Percent lines, click the icon.
    - You should not enter any data into the Position Number & General Ledger Pay Type fields.

Benefits Program Participation Required Fields:

Benefit Program Participation Section:

- *Effective Date:* Use the date first worked – the same effective date as the job record.
- *Benefit Program:* Select the Benefit Program from the drop-down menu. Selection of a Benefit Program is based on the employee's representation status or bargaining unit (and department in some cases).

After you have entered this information, click on the OK button to save all Hire pages.

Understanding Additional Items:

Understanding the Comparative Information Section

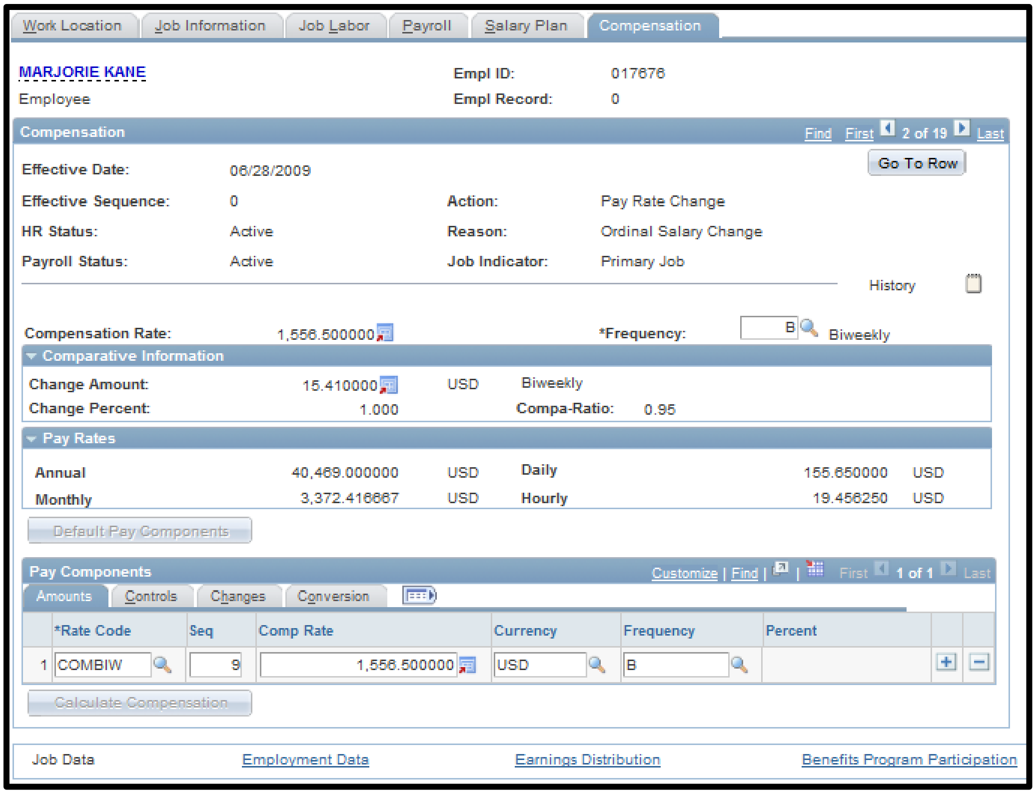
First, you must expand this section to be able to see the data in it, by default it is always minimized on the page. Click the right facing arrow next to Comparative Information to expand the section.

- Compa-ratio simply shows where an employee's salary lies in relation to the midpoint for his salary grade. For example, if a person's current rate is the same as the midpoint; the compa-ratio is 1.00, or 100 percent of the midpoint. The system calculates the compa-ratio based on the Salary Plan and Grade.
- The Change Amount and Change Percent rates populate when there was a change in the employees rate of pay from the previous record to the effective dated record this data fills in on, the system will then show the change data from the previous Comp Rate to the current Comp Rate.

Understanding the Pay Rates Section

First, you must expand this section to be able to see the data in it, by default it is always minimized on the page. Click the right facing arrow next to Pay Rates to expand the section.

Based on the Compensation Rate and Frequency that are in the Pay Components section of the Compensation page, the system calculates and displays the Annual Rate, Monthly Rate, Daily Rate, and Hourly Rate for an employee. The system compares the compensation rate with the range specified for this salary grade on the Salary Grade table. If the rates exceed the salary range, you will see a warning message.

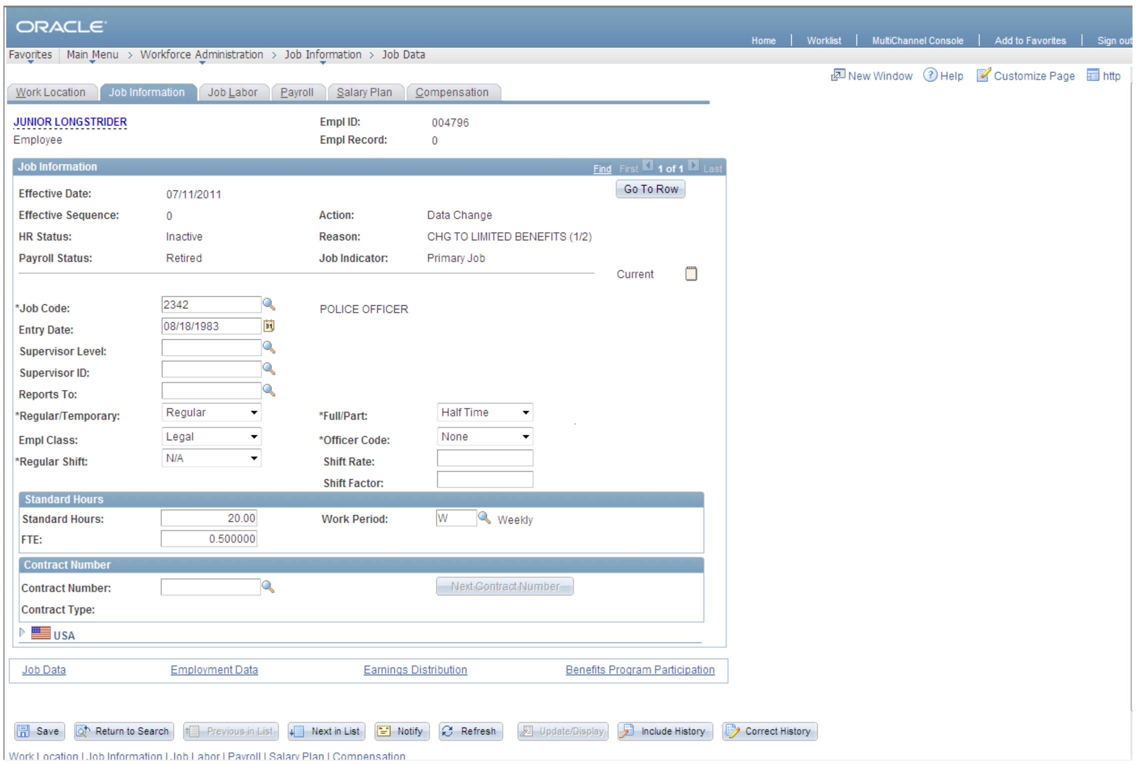

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation
MARJORIE KANE
Employee
Empl ID: 017676
Empl Record: 0
Compensation
Find First 2 of 19 Last
Go To Row
Effective Date: 06/28/2009
Effective Sequence: 0
Action: Pay Rate Change
HR Status: Active
Reason: Ordinal Salary Change
Payroll Status: Active
Job Indicator: Primary Job
History
Compensation Rate: 1,556.500000
*Frequency: B Biweekly
Comparative Information
Change Amount: 15.410000 USD Biweekly
Change Percent: 1.000
Compa-Ratio: 0.95
Pay Rates
Annual 40,469.000000 USD
Daily 155.650000 USD
Monthly 3,372.416667 USD
Hourly 19.456250 USD
Default Pay Components
Pay Components
Customize | Find | First 1 of 1 Last
Amounts
Controls
Changes
Conversion
*Rate Code
Seq
Comp Rate
Currency
Frequency
Percent
1 COMBIW 9 1,556.500000 USD B
Calculate Compensation
Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

Rates of Pay for Part Time Employees

When you are hiring a part-time employee, it is important that a number of values be assigned correctly:

<u>On the Job Information page:</u>

- Enter the actual hours worked in a standard week, such as 20.
- The FTE field will be updated automatically based on the value in the Standard Hours field.
- Enter the correct full-time/part-time (Full/Part) value.

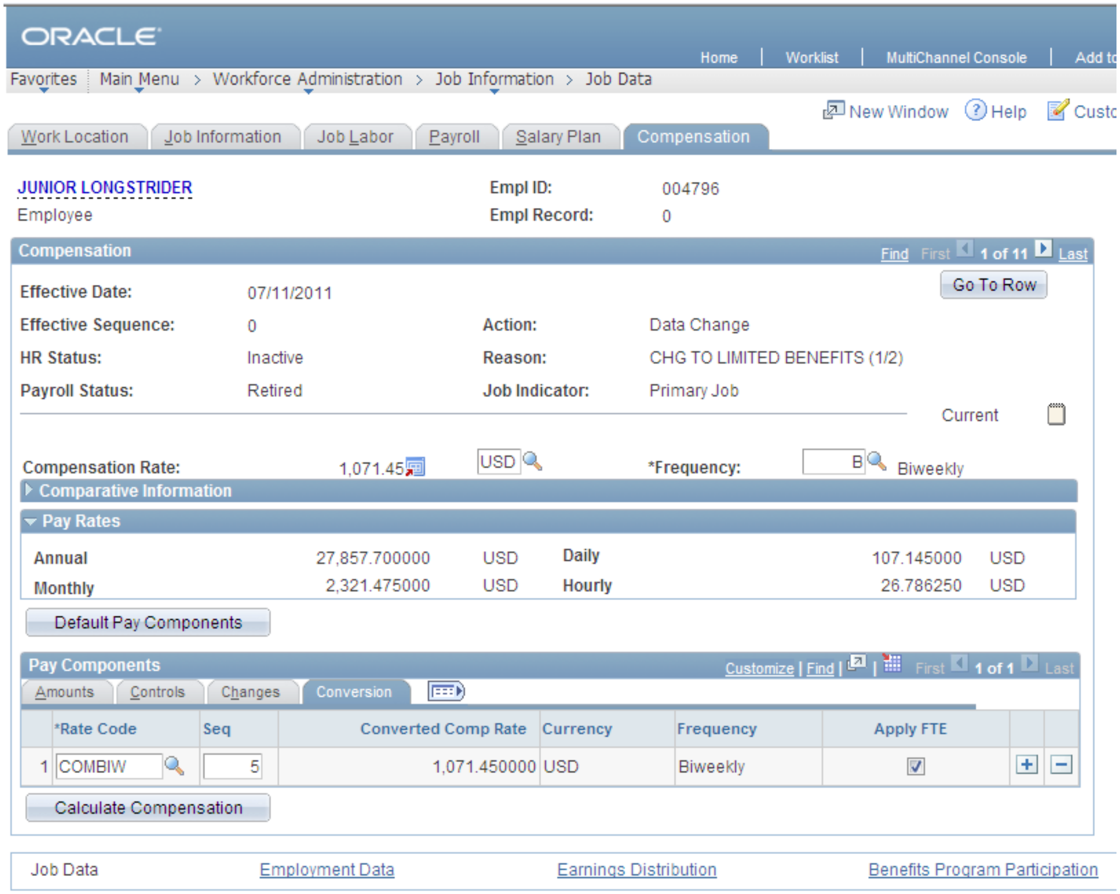


<u>On the Compensation page:</u>

- Click the **Default Pay Components** button to populate the Pay Components box, **however DO NOT do this if you enter a Manual Rate of pay. In that case simply click Calculate Compensation on the bottom of the page once you have typed in the correct full Comp Rate they are entitled to. The system will then calculate out their less than full time equivalent compensation rate.**
- After the default pay component rate populates the Pay Components box, follow these steps:
  1. Click on the Conversion folder tab.
  2. Place a checkmark in the Apply FTE box ☑ by clicking inside the check box.
  3. Click on the **Calculate Compensation** button.

The result will be that the Compensation Rate will be pro-rated based on the actual hours designated as the Standard Hours for the employee. Yet, the Comp Rate on the **Amounts** tab will show the full biweekly rate for the job as if the employee were full-time.

Note: It is not necessary to apply FTE for hourly pay rate groups or full-time employees.



When you are done entering data on the **Compensation** tab, click on the Employment Data hyperlink at the bottom of the page.

Understanding the Impact of HRMS on the On-line Time Entry System

The On-line Time Entry System reads data from HRMS. In turn, time entered into the Time Entry System flows into Payroll. However, any entries made in the Time Entry System regarding rates, account codes, or job codes will **not** update employees' records in HRMS.

Only employees who are **active** during a given pay period will appear on the On-line Time Entry Group page. Inactive employees **will** show on the biweekly page, but the On-line Time Entry System will not accept time for them.

Employee ID

The Employee ID is the *key* that hyperlinks the records in HRMS with the records in On-line Time Entry.

Job Code (Job Information)

Any employee who has more than one active job code will appear in Time Entry in the order of their record #'s, with the lowest # listed all the way to the left and each corresponding higher # will be indented, as shown:

Name:	Job Code:	Description:
Sullivan, Jane	1527.5	ELECTRICAL MECHANIC
Sullivan, Jane	1527F1	ELECTRICAL MECHANIC

Any *inactive* secondary job codes will simply not show up on the On-line Time Entry System Group page.

Crew ID (Employment Data)

Think of Crew ID as a Group ID. The Crew ID places the employee in a group for time entry and approval. It may be the same as the Location code in Work Location.

The value in Crew ID does **not** default from any other field and needs to be manually entered.

- If no Crew ID is present, time cannot be entered for an employee!

CHAPTER 2

UPDATING ADDITIONAL PERSONAL INFORMATION

Objectives

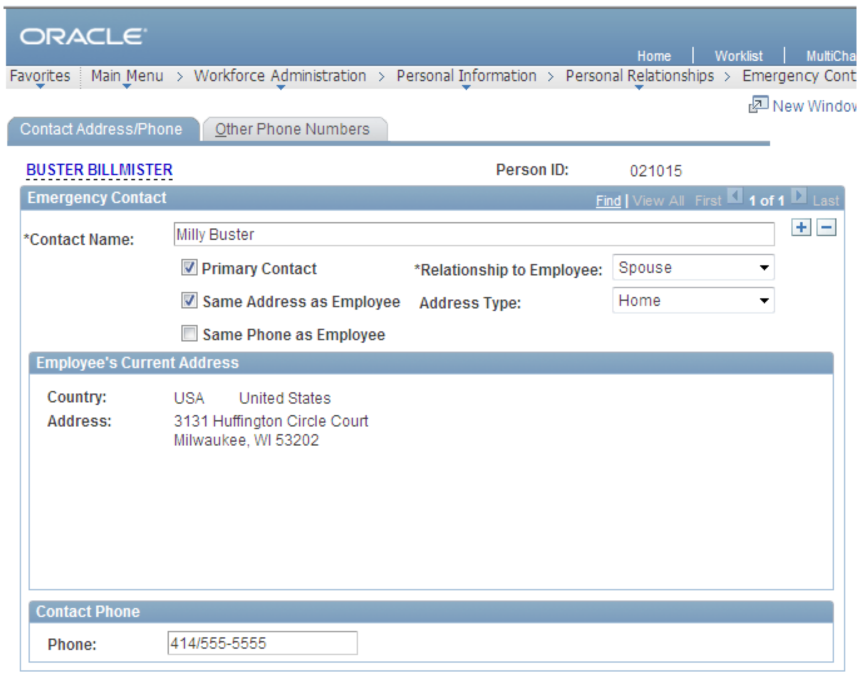
By the end of this chapter, you will be able to:

- Enter Emergency Contact Information
- Enter Driver's License Information
- Enter DER Certificate of Eligible's & Notice of Appointment (Personnel Requisition Number/Examination Score and Rank)
- Enter General Comments

Emergency Contact Information

On the Emergency Contact page, you enter the names, addresses, and telephone numbers of all the people you should contact in the event of an employee emergency. You can enter as many contacts as needed. This data should be maintained.

Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contacts



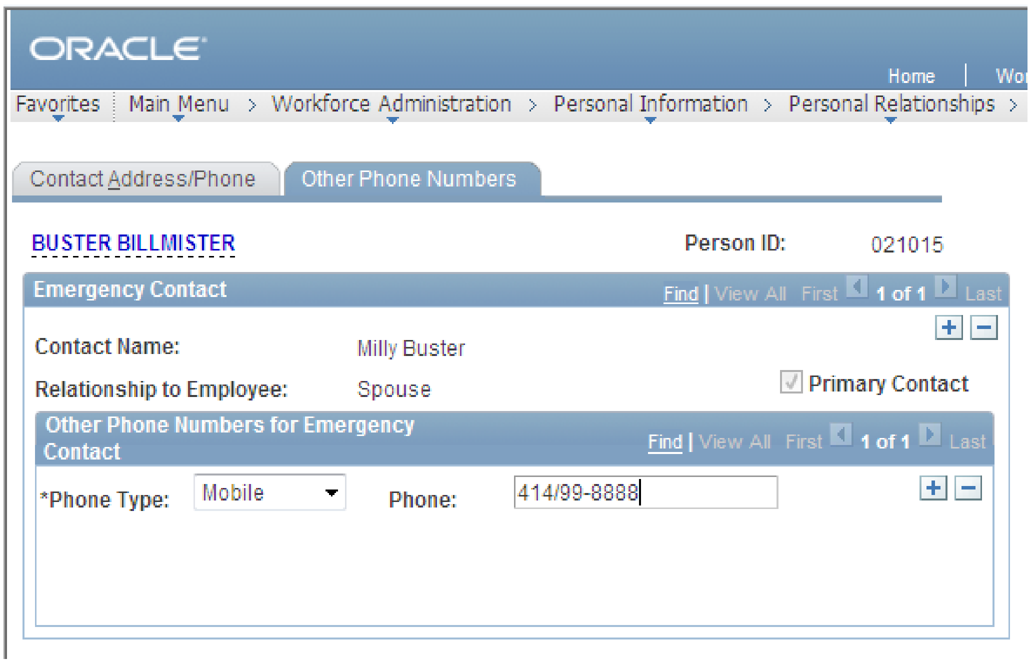
The Emergency Contact page required fields are:

- *Contact Name* Use the standard name format
- *Relationship to Employee* Use the drop down menu.
- *Primary Contact* At least one emergency contact must be indicated as the primary contact.
- *Same Address as Employee* **IF** an emergency contact for the new employee has the same address as the employee, click in the box to enter a checkmark
- *Same Phone as Employee* **IF** an emergency contact for the new employee has the same phone as the employee, click in the box to enter a checkmark
- *Phone* Enter primary phone # for Contact entered

- *Other Phone Numbers* Click on the Other Phone Numbers tab to enter additional phone #'s for the contact such a business or cellular.

  Note: The Emergency Contact's name and relationship follows to the Other Phone Numbers page. You can add more than one additional number such as fax, cellular, etc., by clicking on the + icon.

To enter more than 1 Emergency Contact click the + icon on the Contact Address/Phone page to enter the data for the secondary contact.

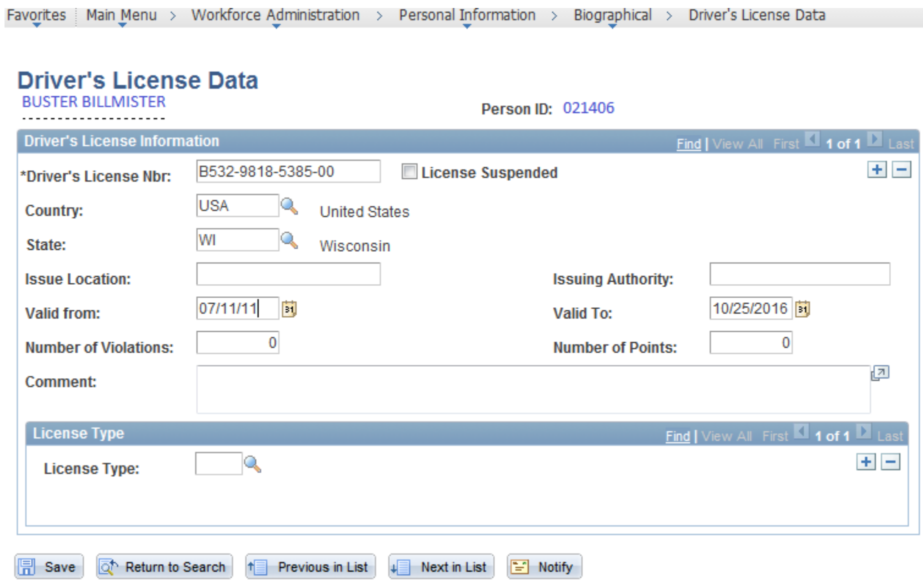


Save the Emergency Contact pages by clicking on the **Save** button.

Driver's License Information

On the Driver's License Data page, you can enter driver's license information for your new employee. This page must be completed for employees in driving jobs.

Main Menu > Workforce Administration > Personal Information > Biographical > **Driver License Data**



The Driver's License Data required fields are:

- Driver's License Number
- Country (default is USA)
- State
- Valid from: This should be date of hire, not the date that the DL was issued
- Valid To: This should be the date that the DL expires
- License Type:
  (**C**=Class C, **CDL**=CDL Drivers License – enter the class type from the License, **M**=Motorcycle, **T**=Truck) – These are entered in the Production database that you are using

These fields are **NOT Required**:

- Issue Location
- Issuing Authority

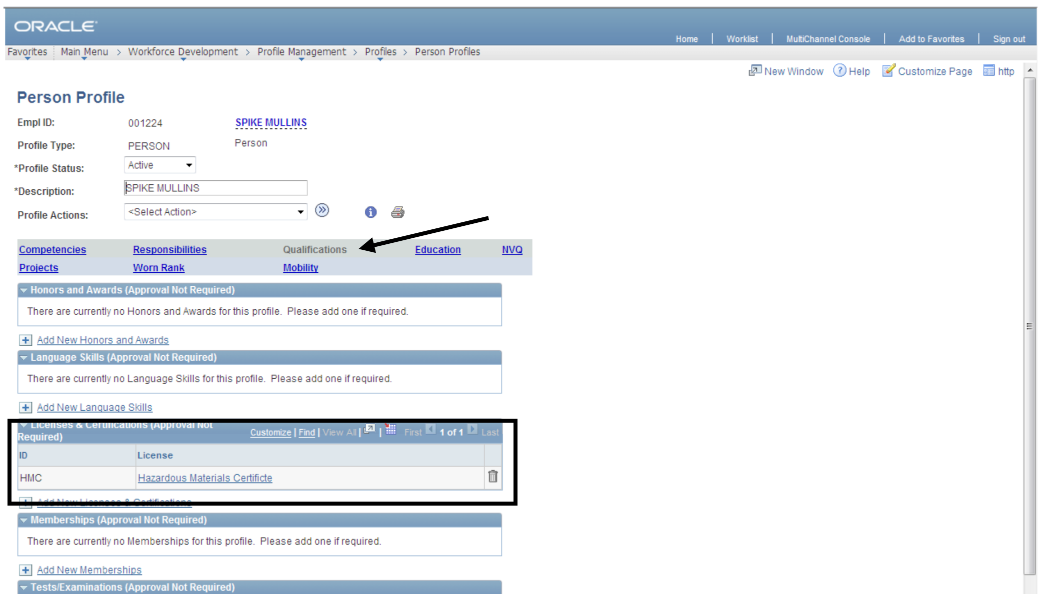
- Number of Violations
- Number of Points
- Comments

Save this page by clicking on the **Save** button.

Personnel Requisition Number

For employees who are hired from an eligible list, you must maintain a record of the examination score and rank.

Main Menu > Workforce Development > Profile Management > Profiles > **Person Profiles**. Click the Qualifications hyperlink.



**License/Certif Code*

- EXAM is used for appointments from original examinations, temporary appointments and provisional appointments.
- EXAMP is used for appointments from promotional examinations.

Required Fields:

- ***Issue Date*** Date of appointment to position.
- ***License #*** The examination number, score and rank. This information is from the Notice of Appointment form from DER-Certification Section. The format is **[exam number]** space **[exam score]** space space **[rank number]**.
  - Note: This field is left blank for temporary and provisional appointments.
- ***Issued By*** The Personnel Requisition number.

Save this page by clicking on the **Save** button

General Comments

Use the General Comments page when you want to keep a record of out-of-the-ordinary transactions or enter a miscellaneous comment about an employee that doesn't belong in any other page in PeopleSoft Human Resources.

Main Menu > Workforce Administration > Personal Information > Biographical > **General Comments**

General Comments Required Fields:

- *Comments By* Enter your name.
- *Comment Date* This should be the effective date of the transaction you are noting.
- *Comments* Enter anything you wish to noteate

Save this page by clicking on the **Save** button.

Important Note: Do not use this page for confidential information that others should not see.

CHAPTER 3

RE-HIRING EMPLOYEES

Objectives

By the end of this chapter, you will be able to:

- Rehire an employee

Re-hiring Considerations to make note of:

When an employee is rehired into city employment you need to check for certain benefits they may have had, see if they are still entitled to them or how much of them they are entitled to, adjust if necessary, or start the employee over as brand new with all benefits including a Service Date.

Reinstatement: Did the employee request reinstatement from the City Service Commission? Depending how long the employee has been gone from city service and if they left from a regularly appointed city service job title, they may be entitled to reinstatement of service and or salary credit. They may also be entitled to reinstatement of their previous sick leave balance. For more information, verification, and help with calculations contact the Certification & Salary Systems Administrator in DER. **Document all adjustments/calculations in general comments.**

Benefits Service Date: Depending on how long the employee was separated from city service and if they were or were not granted reinstatement, the Benefits Service Date on the Employment Data page in job data will most certainly need to be adjusted for the employee's time away from the City, if not re-set entirely to their new rehire date if they were not granted reinstatement at all. For more information, verification, and help with calculations contact the Certification & Salary Systems Administrator in DER. **Document all adjustments/calculations/Benefit Service Date changes in general comments.**

Paid Time Off Balances: This includes Sick Leave, Vacation, Comp Time, TVA, and Sick Leave Incentive Pay. An employee separated from city service in any fashion other than retirement would have been paid out for all existing paid time off balances not used other than Sick Leave, however the process through which this is done does not zero out their balances on the system (in City Time). When the employee returns to City Service, you should verify the payment of these balances (on their last paycheck), and do a TOA payroll adjustment to zero out those balances – all except sick leave. If it's a rehired retiree starting over with a fresh start and a new

Benefits Service Date you should also adjust the Sick Leave balance down to zero. **Document all adjustments in general comments.**

Re-hiring Employees

When you hire an employee who worked for the City in the past, you enter a Rehire action. For example, before his retirement Cliff Stanerbuck previously worked for the City of Milwaukee

Information on a rehired employee is probably already in HRMS, unless the employee data has not been converted. (Employees who have been inactive or off the payroll since December 26, 1997 will not be on HRMS.) If employee records are not in the system, follow the new hire process described in Chapter 1 of Hire Workforce.

If you rehire an employee whose records already exist in the system, you will want to make sure the personal, employment, and job data for that person are up-to-date.

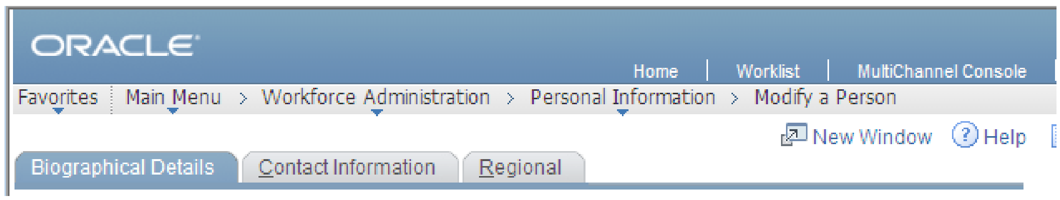
You can only rehire employees whose employee status is **Terminated, Terminated with Pay**, **Retired**, or **Retired with Pay**.

You will probably encounter situations where you want to rehire an employee whose previous job was in a department for which you do not have security access. To handle these cases, contact DER-Pay Services. They will put in an entry to allow you access to this record.

Rehire Process

Step 1. To rehire an employee into the system, first access the Biographical Details page for the employee.

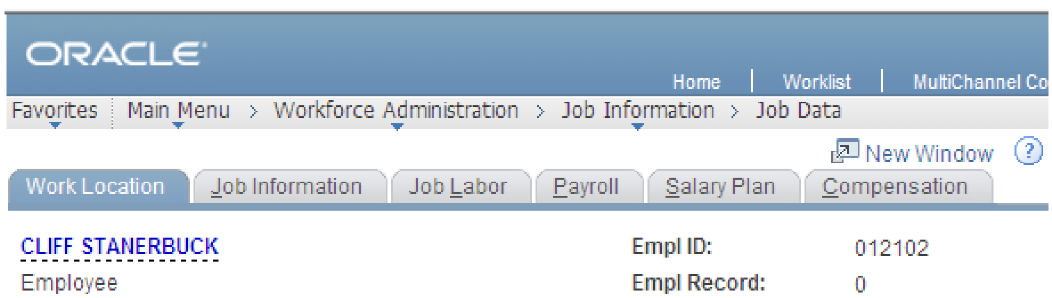
Main Menu > Workforce Administration > Personal Information > **Modify a Person**



Update and verify name information. Click on Contact Information and update any address and phone information by adding a row. Review and verify information on the **Regional** tab. Save your updates by clicking on the **Save** button.

Step 2. Open the **Work Location** page in the Job Data component.

Main Menu > Workforce Administration > Job Information > **Work Location**



Insert a new data row by pressing the + icon.

- **Effective Date:** Change to Date of Rehire (Employee's 1st Day back to work, at work, on the job)

Note: When a Rehire situation needs DER involvement for security access reasons, DER-Pay Services will insert the Rehire Action. You will then insert another transaction to allow you to update all pages.

Effective Dates Reminder

Many times when making changes to an employee's information, you will want to maintain history. In a rehire situation, it is important to retain the employee's previous termination status along with the rehire status. This is why it is required that you insert a new row.

Step 3.

- Select the **Action of REHIRE**
- Select the appropriate Rehire **Reason**
    - The system will change the Employees Payroll & HR Status's to Active.

➢ **See attached Action/Reason list for a complete Up-To-Date list of Rehire Reasons.**

Action	Action Code	Action Reason	Benefit Status	Description	Status
Rehire	REH	A1	A	REHIRE FORMER EMPL-NORMAL CERT	Active
	REH	A12	A	REHIRE FORMER EMPL-RULE VIII, 18	
	REH	A13	A	REHIRE FORMER EMPL-STATUTE 63.41	
	REH	A21	A	REHIRE FORMER EMPL-EXEMPT	
	REH	A22	A	REHIRE FORMER EMP-EXEMPT BY CSC	
	REH	A23	A	REHIRE FORMER EMPL-PROV APPT	
	REH	A24	A	REHIRE FORMER EMPL-TEMP APPT	
	REH	A25	A	REHIRE FORMER EMPL-EMERG APPT	
	REH	A28	A	TRNSFR FRM HACM/RACM-PREV EMPL	
	REH	A27	A	TRANSFER FROM MPS-PREV EMPL	
	REH	A32	A	REINSTATE AFTER RESIGNATION	
	REH	X36	A	REINSTATE AFTER DISCH/TERM	

Confirm or update the following:

- Position ID # - Verify that the position ID # used is the appropriate position ID# for your department and for the appropriate location within your department
- Department and Department Entry Date
- Location

Step 4. Access the **Job Information page** by clicking on the folder tab.

Confirm or change the following defaults based on the selected department and job:

- Job Code
- Regular/Temporary
- Full/Part Time

- Empl Class for Civil Service Status
- Officer Code
- Standard Hours
- FTE

Step 5. Access the **Job Labor page** by clicking on the folder tab.

Confirm or change the following values:

- Union Code
- Bargaining Unit
- Union Seniority Date

Step 6. Access the **Payroll page** by clicking on the folder tab.

Confirm or change the following values:

- Employee Type
- Holiday Schedule
- Pay Group
- FICA Status

Step 7. Access the **Salary Plan page** by clicking on the folder tab.

Confirm or change the following defaults based on the selected department and job codes:

- Grade
- Step

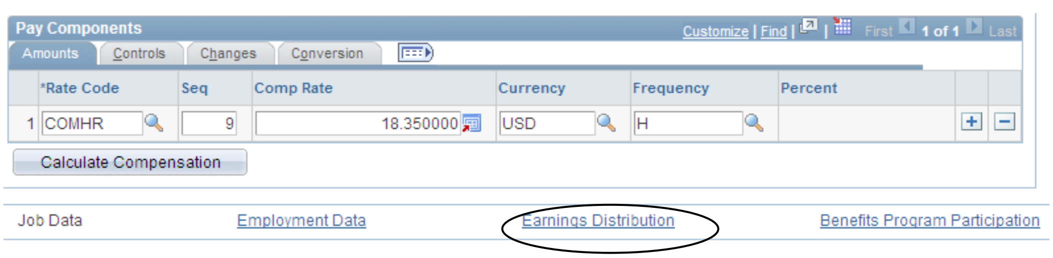
Step 8. Access the **Compensation page** by clicking on the folder tab.

Enter a Manual Rate of pay and Click Calculate Compensation or, Click on the **Default Pay Components** button to populate the Pay Components fields with the new data.

Enter or update the employee's Footnote rate, if applicable.

If it is a less-than-full-time employee, click on the **Conversion** tab, check the Apply FTE box ☑, and then click on the **Calculate Compensation** button.

Step 9. Click on the **Earnings Distribution hyperlink** at the bottom of the page.



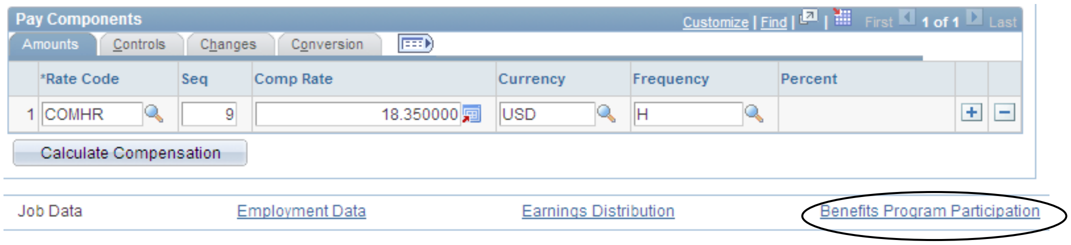
This page is used to distribute the employee's compensation for one job to different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the employee's pay should be charged to more than one cost center on a regular basis, this is where you designate how much should be allocated to each cost center. This page will be used for *Exception Hourly* employees.

For *Exception Hourly* employees, select Percent in Job Earnings Distribution Type. Enter or update:

- Department
- Job Code
- Distrib %
- Account C*ode*
- Earn Code – Should be defaulted to 077

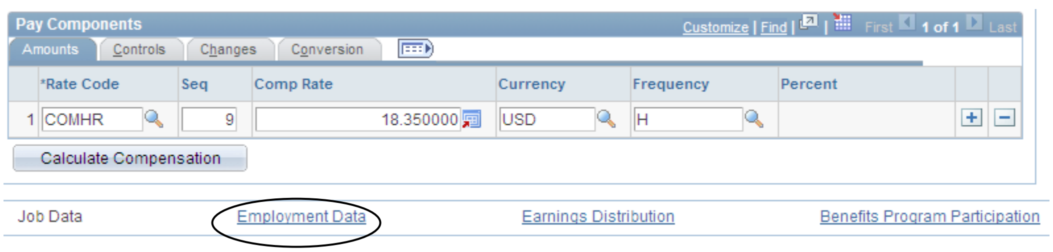
Reminder: Percent lines must total 100%. To insert another Percent line to make your distributions, click on the  .

Step 10. Click on the **Benefit Program Participation hyperlink** at the bottom of the page.



Do NOTHING on the Benefit Program Participation page. This page will be automatically accurately updated when Employee Benefits runs "Event Maintenance"

Step 11. Click on the **Employment Data hyperlink** at the bottom of the page.



Update, if necessary:

- Crew ID
- Benefits Service Date – Be sure to make a note in "General Comments" with regards to what you've updated the Benefits Service Date to & what the previous date was.
  - You will typically get an e-mail from DER with information on how this field should be updated along with other relevant re-hire information. You should copy the entire contents of this e-mail into General Comments, along with the date you received it and who you received it from.
- Probation Date
- Department Job Seniority Date
- Frozen Anniversary Date – This date typically will NOT change

The Rehire Date will default from the effective date on Work Location. The Termination Date field is now blank because you selected a Rehire Action.

Step 12. Save your updated employee record by clicking on the **Save** button.

Step 13. Verify or update the Emergency Contacts information for this employee:

Main Menu > WorkForce Administration > Personal Information > Personal Relationships > **Emergency Contacts**.

To add an additional Emergency Contact, insert a new data row by pressing the Insert Row icon  . Complete the fields for the new Emergency Contact. Click on the **Save** button.

Review Questions

1. **When using a rehire action, what should the employee's status be?**

   You can only rehire employees whose employee status is Terminated, Terminated with Pay, Retired, or Retired with Pay.

2. **What should you do if you do not have security access to view the record of a past employee?**

   This rehire situation needs DER involvement. DER-Pay Services will insert the Rehire Action. You will then insert another transaction to allow you to update all pages.

3. **What is the significance of Employment Record Numbers?**

   It is the key that connects Job, Employment, Earnings Distribution, and Benefits.

4. **When adding a concurrent job, how do you retrieve the employee record?**

   The dialog box for Add-Concurrent Job pops up and asks for Employee ID. If you did not take note of the employee's Employee ID, you will need to look it up before you can proceed.

5. **What is the significance of the Job Indicator field?**

   It specifies which record is the primary job for employees with multiple concurrent jobs.

CHAPTER 4

UNDERSTANDING CONCURRENT JOBS

Objectives

By the end of this chapter, you will be able to:

- Understand the concept of concurrent jobs (or additional assignments)
- Perform updates to job records to add additional assignment to individual records
- Perform updates to job records to terminate employees.

Overview

The purpose of this overview is to provide you with a general understanding of the use of concurrent jobs within the HRMS system. It will build on the information covered in the courses HRMS Inquiry and Maintenance and Hire Workforce.

What is a concurrent Job?

Many employees hold valid appointments to more than one job title at a point in time. Sometimes this is because labor contracts provide unique rates of pay for several jobs that an employee may perform. Sometimes an employee has met City Service requirements for appointment to several job classifications. Also, some employees may perform different jobs on an emergency or temporary basis.

As a result, some employees may work at multiple job titles that have different rates of pay within a particular week—or even within one day. This is mainly true in DPW. There are also some City employees who work most of the time in one job classification throughout the year, but may work on elections for the election commission. Another category of concurrent jobs is for fire department personnel who work the firefighter schedule some of the time, but work on an administrative schedule some days. They have different biweekly rates on two job records to reflect that difference in schedule.

As maintenance is performed to assure that the correct pay is calculated for the work performed, care must also be taken to assure that the employee's benefit eligibility also remains correct.

Understanding Primary Job Flag

The Job Indicator field, which is on the Work Location page, is an important field because it will always indicate the record that establishes the Benefit Program which is key in establishing parameters used to define employees' benefits. In addition, it is used in some reports that list employees. The Job Indicator should be designated **Primary Job** for the Job that the employee's benefits are based. It is important to note that only one Job record can be flagged as Primary. All the others must be identified as Secondary jobs.

A Note About Employment Record Numbers

It is important that you understand how the City uses Employment Record Numbers.

If an employee has concurrent jobs, the system uses Employment Record Numbers to track data separately for each concurrent job. When information was entered on the first job for an employee, the system automatically assigned the employment record number **0**. When subsequent jobs are added to the system, each is assigned a different employment record number.

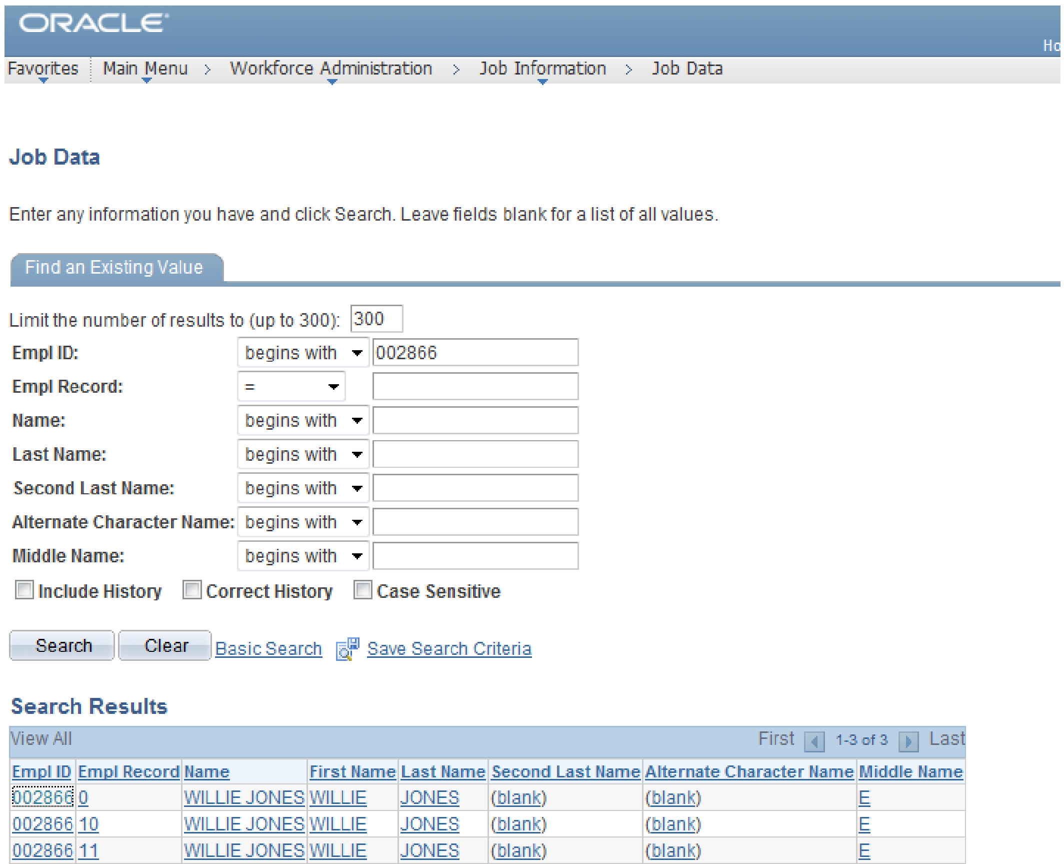
For the second job, the City will assign employment record number **1**. For each additional job, numbers are assigned sequentially. The employment record number corresponding with each job will be one less than the job itself.

Job	Employment Record Number
1	0
2	1
3	2

Identifying Employees With Concurrent Jobs

You can search for employees with multiple concurrent job assignments by the Employment Record Number (Empl Rcd Nbr) field throughout HRMS 9.1.

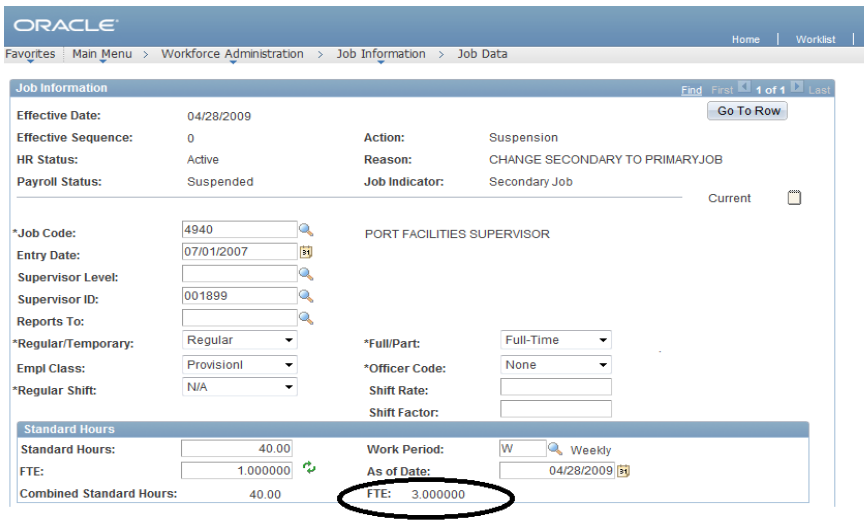
*Willie has **three** jobs.*



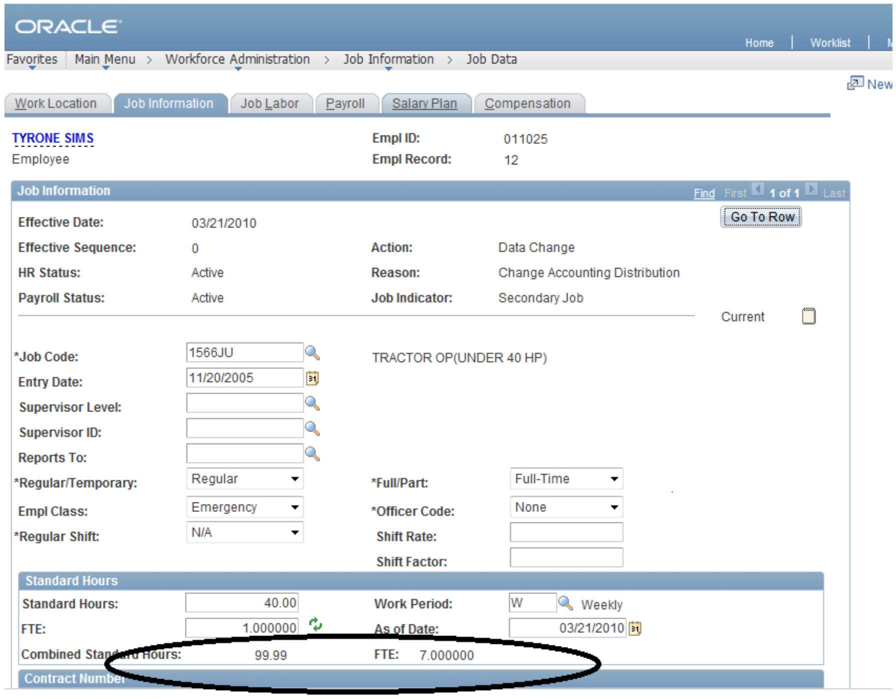
Recognizing Multiple Jobs Within an Employee Record

Recognizing multiple jobs on an employee's job record is easy, using the Combined Std Hours/FTE (Combined Standard Hours/Full-Time Equivalent) field, which appears on the Job Information page.

*Willie has **three** jobs:*



*Tyrone has **seven** jobs:*

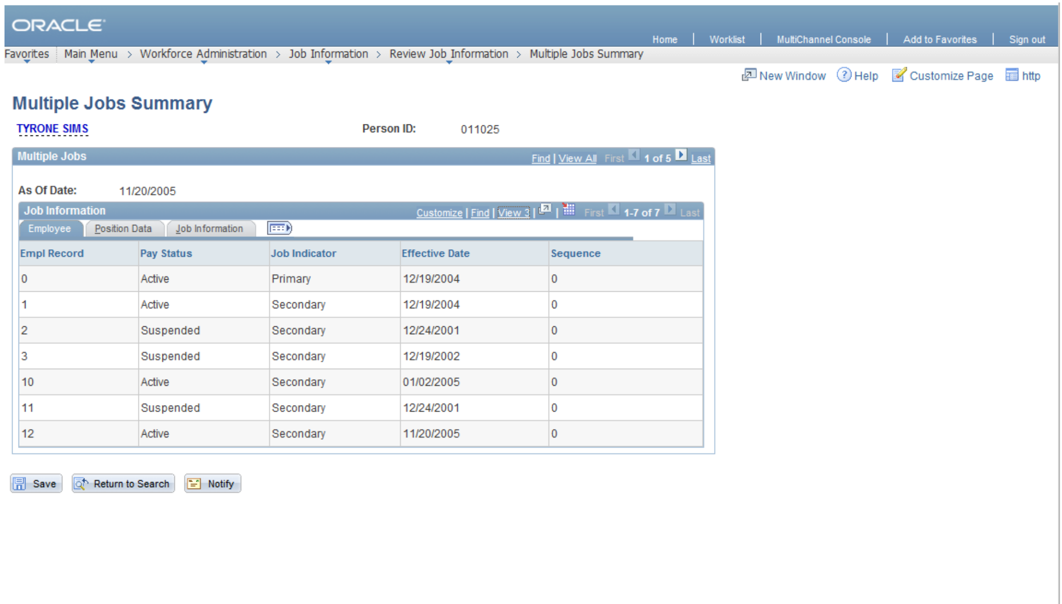


(*Note:* The combined standard hours for seven jobs would be 280; the system only displays up to 99.99)

Viewing Employee Records With Multiple Jobs

Use the Multiple Jobs inquiry page to view a summary of an employee's jobs and changes in employee status. Notice only one job is indicated as the Primary job.

WorkForce Administration > Job Information > Review Job > Multiple Job Summary

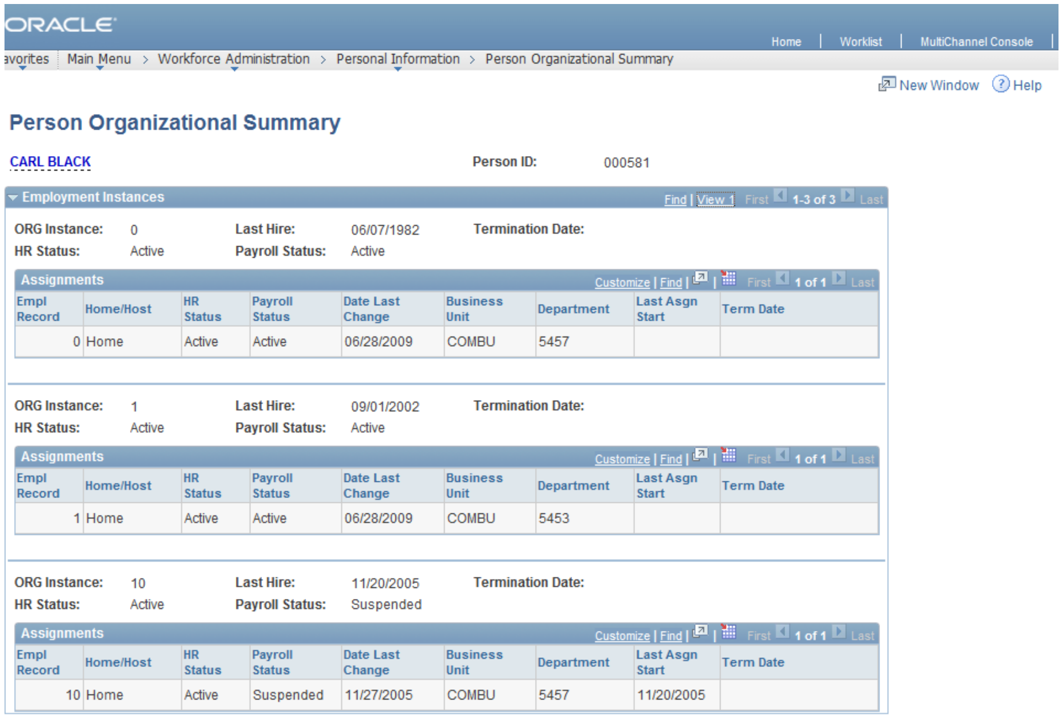


Another way of reviewing the multiple assignments of an employee is from the Person Organizational Summary.

<u>Workforce Administration</u> > <u>Personal Information</u> > <u>Person Organizational Summary</u>

It lists all departments where an employee has active or inactive job records. It does not include the job code.

It looks like this for employees who had multiple jobs at the time the City upgraded to the current version of HRMS:


ORACLE

Home | Worklist | MultiChannel Console

avorites | Main Menu > Workforce Administration > Personal Information > Person Organizational Summary

New Window Help

Person Organizational Summary

CARL BLACK   Person ID: 000581

Employment Instances   Find | View 1 First 1-3 of 3 Last

ORG Instance: 0   Last Hire: 06/07/1982   Termination Date:
HR Status: Active   Payroll Status: Active

Assignments   Customize | Find | First 1 of 1 Last

Empl Record	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
0	Home	Active	Active	06/28/2009	COMBU	5457		

ORG Instance: 1   Last Hire: 09/01/2002   Termination Date:
HR Status: Active   Payroll Status: Active

Assignments   Customize | Find | First 1 of 1 Last

Empl Record	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
1	Home	Active	Active	06/28/2009	COMBU	5453		

ORG Instance: 10   Last Hire: 11/20/2005   Termination Date:
HR Status: Active   Payroll Status: Suspended

Assignments   Customize | Find | First 1 of 1 Last

Empl Record	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
10	Home	Active	Suspended	11/27/2005	COMBU	5457	11/20/2005	

There is a row for each assignment an employee has held. There is one Organizational Instance for each employee job record that existed on the system. More on that in the upcoming chapters.

Look up the answers to these questions, and jot the answers in the space provided:

1. What is the primary job for Jefferson Nieves? _________

   On what page did you find it? __________

2. Which Empl rcd # is his primary job? __________

   What page?______

3. How may Empl_Rcd #s are used for Jefferson Nieves? _______

   What page?_______

4. How may Empl_Rcd #s are active for Jefferson Nieves?_______

   What page?____

5. To which Benefit Program does Jefferson Nieves belong? _________

   What page?_____

6. How many organizational assignments exist for Jefferson Nieves?

____

What page? _______________

EXERCISE – View Person Organizational Assignment Data

Workforce Administration > Personal Information > Person Organizational Summary

For the emplid provided, look up organizational assignment data.

Emplid ____________________

Org Instances ____________________

Empl Rcd #s ____________________

CHAPTER 5

ADDING ADDITIONAL JOBS

Objectives

By the end of this chapter, you will be able to:

- Understand the process of adding additional jobs
- Understand the key dates and fields used in adding additional jobs
- Understand how historical records related to concurrent jobs have been converted through various upgrades.

Overview

HRMS allows the City to maintain complete job information for employees who hold more than one job at a time. We can add a concurrent job, by adding an additional assignment.

As mentioned earlier, for all of cases of multiple concurrent job records, the Job record is maintained with additional employee record numbers for the additional concurrent jobs. The initial job record has Employee Record Number 0. Additional jobs are numbered 1 and higher. In most cases the primary job for an employee is Employee Record Number 0, but that may change over time. The primary job is indicated by a flag on the job record—the Job Indicator. Only one Job record should be flagged as Primary. All the others should be flagged as Secondary.

Understanding the Process of Adding Additional Jobs

PeopleSoft Enterprise Human Resources enables you to keep complete job information about workers who hold more than one job at a time in an organization.
These are the basics of adding additional assignments:

Add Additional Assignment
A new assignment is created and attached to an existing organizational instance.
Additional Job Action is used**. It should only be used when adding a new assignment record.**
Additional Job is tied to the controlling instance.
This action retains the hire, service and termination dates of the controlling instance.
Termination of the controlling instance assignment will automatically terminate all associated assignments.

These are some key terms for maintaining additional assignments:

Term	Definition
Organizational Relationship Field: PER_ORG	How a person is related to the organization and represented in the database. There are three major categories of people that HCM tracks information on: • Employee • Contingent Worker • Person of Interest A person can have one or more of these relationships at any one time, including multiple occurrences of the same relationship. The City is currently using Employees. Each distinct relationship includes a Job Data record, which is uniquely identified by an EMPL_RCD. This is exactly as in the past.
Organizational Instance Also known as Controlling Instance Field: ORG_INSTANCE_ERN	An occurrence of an organizational relationship. Also referred to as an Employment Instance, a Contingent Workforce Instance, or a POI Instance. Organizational instances can be limited to one assignment (EMPL_RCD) or include multiple assignments. For most City of Milwaukee employees, there is only one Organizational Instance. In some cases, particularly for DPW, there may be multiple assignments. When an organizational instance includes more than one assignment, one of those assignments is identified as the controlling instance. This EMPLID/EMPL_RCD combination stores the HIRE_DT, general SERVICE_DT, and the TERMINATION_DT.

Term	Definition
	The existing job record that is Primary should be the instance used for adding additional assignments in version 9.1. For example, a person can have a single Employment Instance with a company, but as part of that employment instance, they have three separate assignments, each identified by different EMPL_RCD numbers. One of these EMPL_RCDs is identified as the controlling instance containing the overall dates. The others refer only to the particular assignment.
Additional Assignment Identified by the EMPL_RCD & the ORG_INSTANCE_ERN combination.	A concurrent assignment in addition to, & under an existing assignment. Also referred to as Multiple Assignments. Some organizations allow their workforce to have multiple, concurrent assignments. Each of these assignments needs to be tracked under a distinct EMPL_RCD. **This is the methodology the City chose to use in order to prevent multiple Hire transactions for the same employee.**
Multiple Instances EMPL_RCD will always equal the ORG_INSTANCE_ERN.	This is a concurrent assignment in addition to an existing assignment. Some organizations allow their workforce to have multiple, concurrent assignments and *do* wish to track each as a separate assignment with an action of hire. In this case, create each assignment as a separate instance (either of Employment or Contingent Workforce). The multiple instances are not related in any way to the others instances this person has. **This is not the method the City is using as we go forward with version 9.1.**

How to Enter Multiple Jobs for an Employee

Here is an overview of the process for adding a concurrent job for an employee:

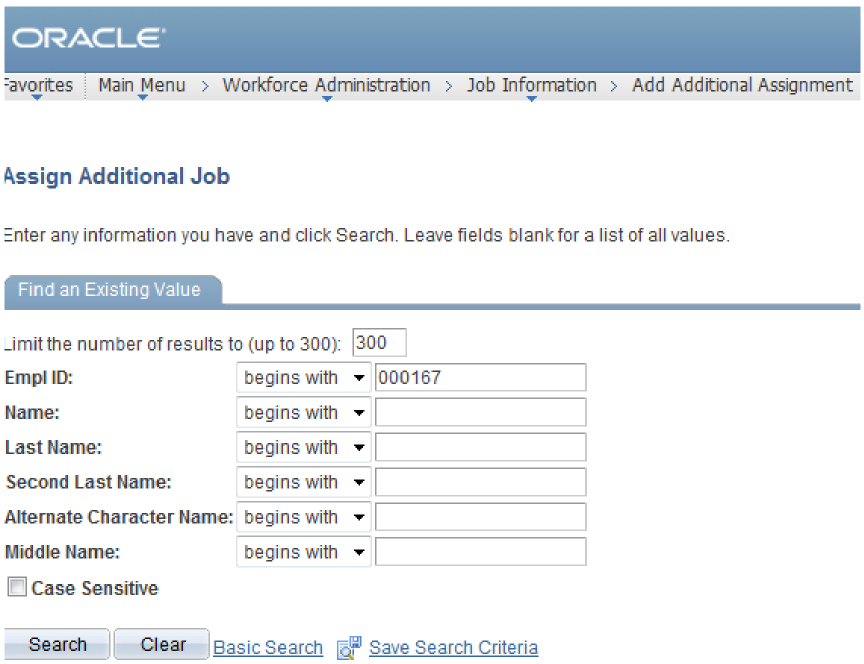
- Open the Add Additonal Assignment component in the Workforce Administration menu.
- Look up the employee’s Employee ID –**OR**– enter the employee's ID in the EmplID field.
- The system assigns this job a new employment record number. The default number is the highest existing employment record number for that employee, plus 1. For example, if the employee's highest existing employment record number is 2, the system assigns 3 as the new job employment record.
- Complete the pages in the component as needed for the new job.
- Review Benefit Primary Job designation.

Handling Multiple Jobs

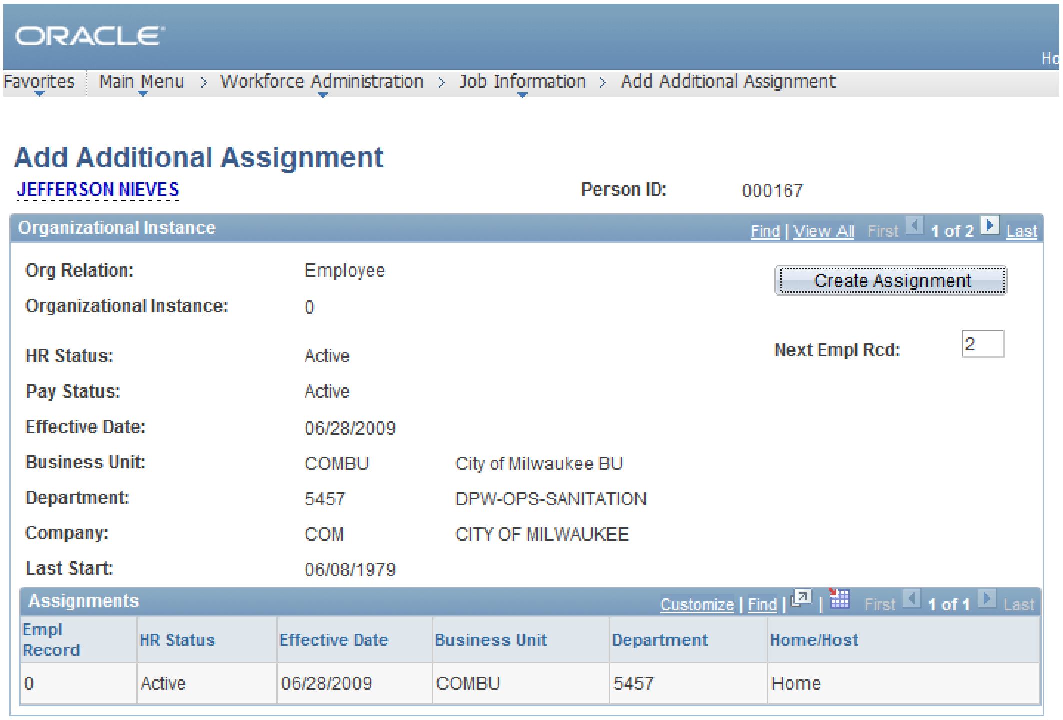
HRMS 9.1 enables the City of Milwaukee to keep complete job information about employees who hold more than one job at a time. You can add a concurrent job to an employee's employment record. Use the Add Additional Assignment component in Workforce Administration to enter new jobs for employees who already have one or more jobs.

Workforce Administration > Job Information > **Add Additional Assignment**

Step 1. To enter information on the concurrent job, select Additional Assignment



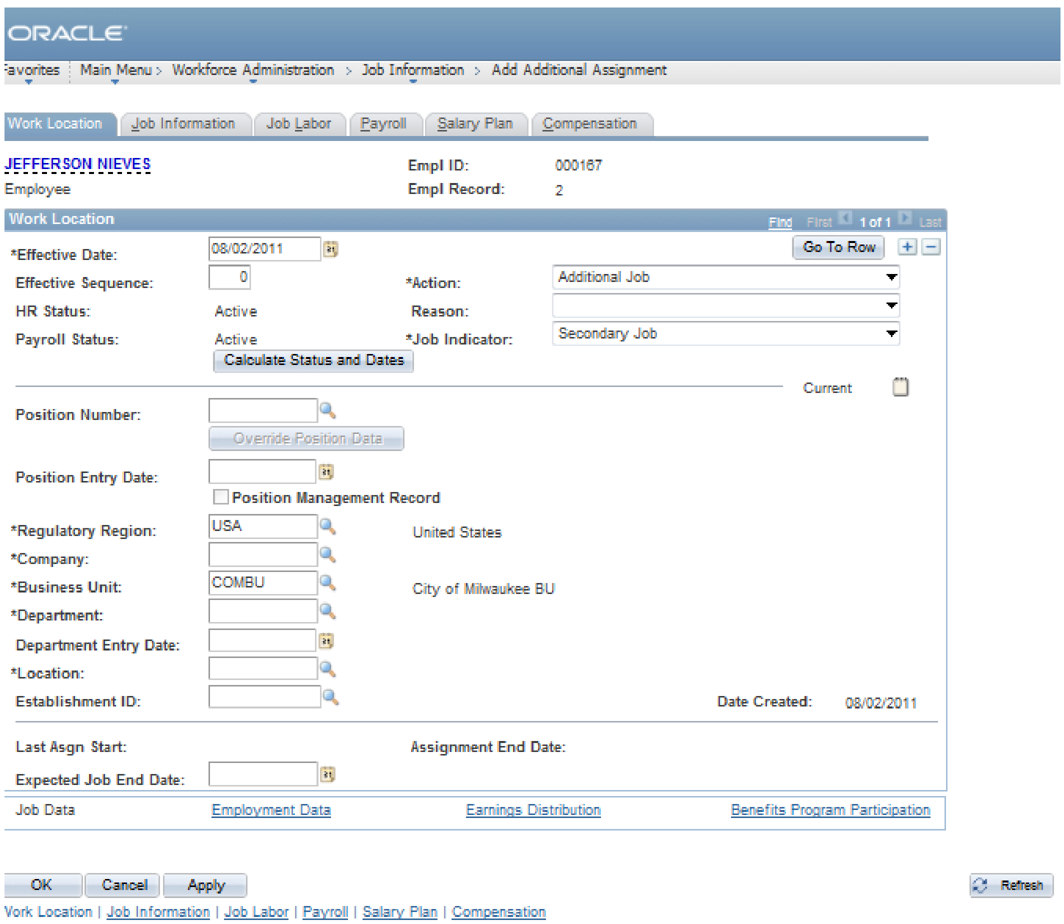
Step 2. Look up the employee's Employee ID –**OR**– enter the person's Employee ID in the EmplID field. Click on Search.


ORACLE
Favorites | Main Menu > Workforce Administration > Job Information > Add Additional Assignment
Add Additional Assignment
JEFFERSON NIEVES
Person ID: 000167
Organizational Instance
Find | View All First 1 of 2 Last
Org Relation: Employee
Organizational Instance: 0
Create Assignment
HR Status: Active
Next Empl Rcd: 2
Pay Status: Active
Effective Date: 06/28/2009
Business Unit: COMBU City of Milwaukee BU
Department: 5457 DPW-OPS-SANITATION
Company: COM CITY OF MILWAUKEE
Last Start: 06/08/1979
Assignments
Customize | Find | First 1 of 1 Last
Empl Record
HR Status
Effective Date
Business Unit
Department
Home/Host
0
Active
06/28/2009
COMBU
5457
Home

Step 3. Press Create Assignment for auto-assign record number.

Step 4. On the Work Location page, the defaulted action is Additional Job, which is the one to use. The Empl Record number is the next one available.

Then use the drop down menu to select the appropriate Reason.



The required fields for the Work Location page are:

Effective Date Must be new employee's first day on the job.

Action/Reason Action must be ***Additional Job*** when adding a new additional job record.

Key Fields:

Effective Date The Effective Date defaults to the system date, usually today's date.

Job Indicator Indicator can be Primary or Secondary when adding an additional assignment. Only one assignment record can be designated as Primary; all others must be Secondary.

Department Enter appropriate department

Location Enter appropriate location

Position # This field is not required

When you are finished entering data on the Work Location tab, it should look similar to the example above.

When you are finished entering data on the Work Location tab, **you must press the "Calculate Status and Dates" button**. This will populate date fields on the Employee Data page.

The following steps are identical to those used for normal job maintenance.

Step 5. Click on the Job Information folder tab. Enter the Job Code.

Verify or change the following defaults based on the selected department and job:

- Regular/Temporary
- Entry Date
- Full/Part Time – Full-Time, Half-Time, More than Half-Time, Less than Half-Time, or Seasonal
- Officer Code
- Standard Hours

Step 6. Access the Job Labor page by clicking on the folder tab.

Verify and maintain the following values:

- Union Code
- Bargaining Unit

Step 7. Access the Payroll page by clicking on the folder tab.

Confirm or change the following values:

- Pay Group
- Employee Type
- Holiday Schedule

Step 8. Access the Salary Plan page by clicking on the folder tab.

Confirm or change the following defaults based on the selected department and job codes:

- Salary Administration Plan
- Grade
- Step

Step 9. Access the Compensation page by clicking on the folder tab.

For jobs that have steps, click on the Default Pay Components button to populate the Pay Components fields with the new data. For management employees, where there are no steps in the Salary Plan, enter the rate of pay in the Compensation field manually.

Enter or update the employee's Footnote rate, if applicable.

If it is a less-than-full-time employee, click on the Conversion folder tab, check the Apply FTE box ☑, and then click on the Calculate Compensation button.

Step 10. Click on the Job Earnings Distribution hyperlink at the bottom of the page.

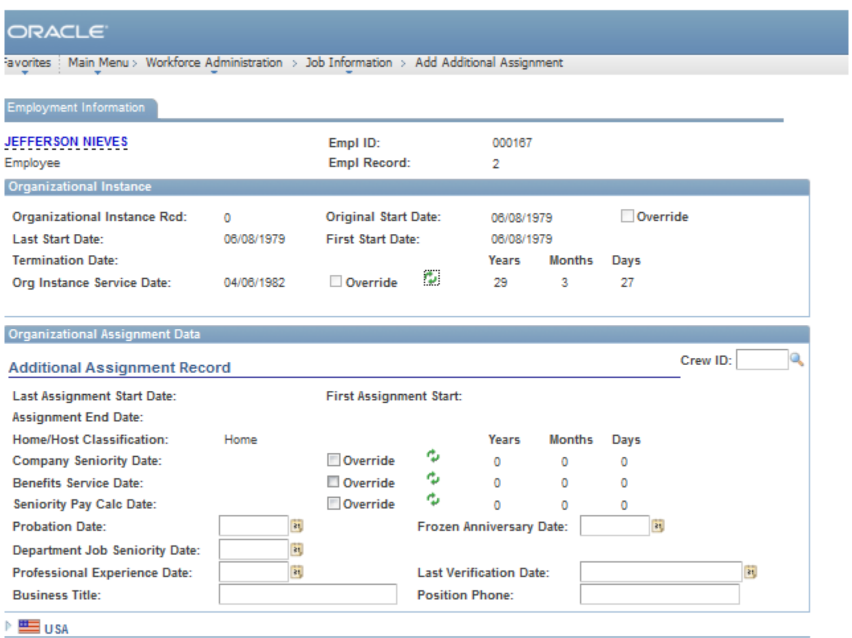
The Earnings Distribution Type defaults to None. **For DPW multiple-job employees, *you must leave the distribution type as "None."*** If you want to distribute the earnings to different accounts, you can choose to allocate the earnings **By Percent**. After you choose this option, enter the department charged (Department), job code (Job Code), distribution percentage (Distrb%), GL Pay Type, account code (Account Code), and earnings code (Earn Code). Remember, the sum of the percentages in the distribution lines must equal 100. To insert additional Percent lines, click the  button.

Step 11. *You will not make changes to the Benefits Program Participation page. This is because benefits will be driven by the employee's primary title (record #0) in all cases.*

Be aware of the Benefit Record Number field. This field should equal 0. This means that benefits are driven by the primary title. You may receive a warning that the Benefit Record Number does not equal the Employment Record Number. You can ignore this warning and click on OK.

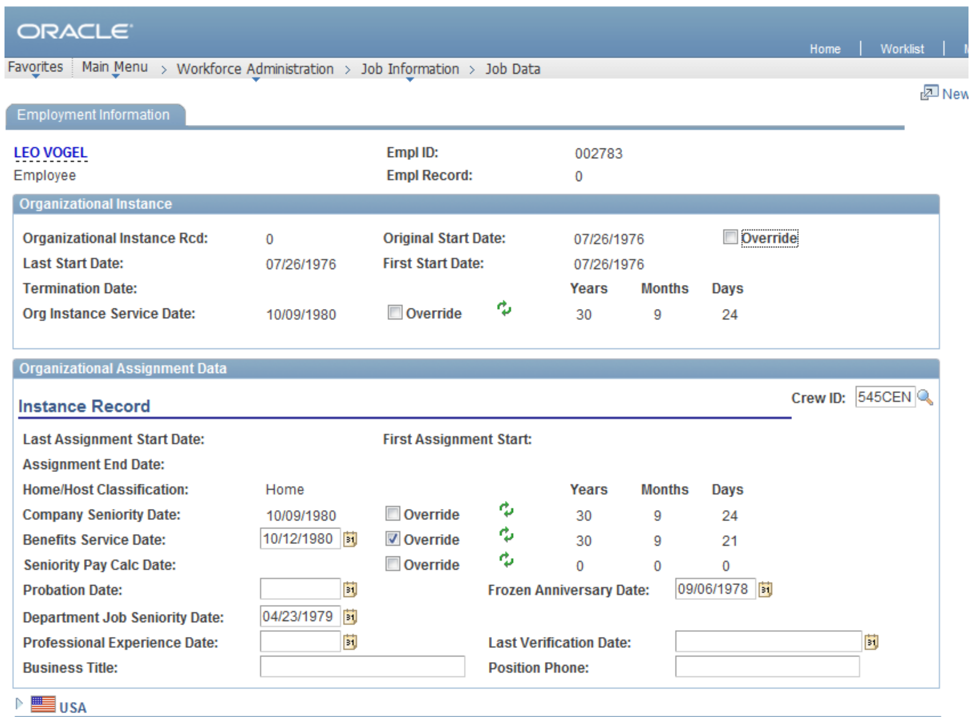
Step 12. Click on the Employment Data hyperlink.

If you clicked on the "Calculate Status and Dates" box in the Job Data component, the Employment Data page should open already populated with information. If the page is not populated it will look similar to the one below.



If the Employment Data page looks similar to the one above, click on the "Job Data" hyperlink at the bottom of the page. The system will send you back to the Work Location tab on Job Data where you can click on the "Calculate Status and Dates" box. Go back to the Employment Data page and see that it has been populated with data.

When populated with data, the page should look similar to the one below. The dates occurring under the section Organizational Instance will not change as additional assignments are added. The dates under Instance Record may be updated by checking the Override box and then entering the date that should be used. Additional information on this process is in Chapter 3.



The fields for the Employment Data Page are:

Crew ID	Required for Online Time Entry; places the employee in a group for time entry.
Probation Date	Optional, for appointments to a new job for employees who will be serving a probation period this date should be the same as last start date.
Department-Job Seniority Date	Optional, for additional assignments, it should be the start date in this new job.

Professional Experience Date	This field will not be used.
Business Title	This field is not required.
Frozen Anniversary Date	Based on the Primary Job only, the Frozen Anniversary Date is the date that a person completes one full year of service. Often that is one year from the person's start date. It is only used for determining vacation for employees who are **not** on the biweekly vacation accrual system. This field can be left blank on any secondary jobs.
Last Verification Date	This field will not be used.
Position Phone	This field is optional.
First Start Date	The system displays the employee Hire Date on this page.
Termination Date	This field populates when you process a separation or a layoff.
Company Seniority Date	Based on the date that you enter here, the system calculates the number of years, months, and days of seniority for an employee.
Benefits Service Date	For Primary Jobs only, based on the date you enter here, the system calculates the total years, months, and days of

service for an employee, including any credit for military leave. This date is used to calculate benefits.

Sen. Pay Calc Dt This field will not be used

Step 13. After you have entered this information and reviewed it carefully, click on your **Save** icon to save all the pages.

EXERCISE – Add an Assignment to Org Instance 0 for your EmplID

Main Menu > Workforce Administration > Job Information > Add Additional Assignment

For department, use the same department and location as the primary job.

For Job code, use 1001DC.

Emplid ________________

The new Empl rcd # ___________________

Below is a chart that outlines other considerations when performing concurrent job transactions.

Adding a Concurrent Jobs When an Employee Has One Job Record
A) If the new job will be the Primary Job: When an employee already has one job record, and a concurrent job must be added, if the new job will be the Primary Job, follow these steps: 1. First update the active job with the effective date you will be using for the new concurrent job. 2. Change the Job Indicator field on the record to Secondary Job. (You will receive a warning message.) 3. Add the new concurrent job, and select Primary Job as the Job Indicator on this new job record. Use the effective date that the employee will first work in this new job.

4. On the Employment Data page, check to make sure that Service Date is the date that was recorded for his or her existing primary job. If not, change it.

B) If the new job will be a Secondary Job:

When an employee has one job record, and a concurrent job must be added, if the new job will be a Secondary Job, follow these steps:

1. Add the new concurrent job, and select Secondary Job as the Job Indicator on this new job record. Use the effective date that the employee will first work in this new job.

Changing Which Job is the Primary Job For An Employee Who Has Multiple Concurrent Jobs

When an employee has multiple concurrent jobs, and it is necessary to change which job is the primary job, follow these steps:

1. First update the Job Record that is currently the Primary Job. Use the action Data Change and the reason SEC (Change to Secondary Job); change the Job Indicator field to read "Secondary Job."
2. On the Job record which was previously secondary, insert a row to update it, use the same effective date as the previous transaction, and use the action Data Change, and the reason PRI (Change to Primary Job.)

Changing One Concurrent Job to Primary and Suspending the Old Primary Job

When an employee has multiple concurrent jobs, and it is necessary to change which job is the primary job and the old Primary Job is being suspended, follow these steps:

1. Update the job record that is currently the primary job. Use the action Suspension and select the appropriate reason; change the Job Indicator field to Secondary Job.
2. For the job record that was previously the secondary job, insert a row, use the same effective date as the previous transaction, and use the action Data Change and the reason PRI (Change to Primary Job.) Verify the proper value is displayed in the Job Indicator field (should be Primary Job.)

When changing the Primary Job Flag as in the two examples above, you will update the Job Code, Union Code, and pay component to updated values as needed. You should also review and update as needed the Frozen Anniversary and Benefit Service date on the Primary Job record. Do not change the Benefits Record for these changes. Let the Ben Administration process update the Benefit Program according to the eligibility rules set in the system.

EXERCISE – Suspend the job record with the highest active Empl Rcd # Data

On the Job record where you added an assignment, suspend the job with an effective date two weeks from today's date.

EXERCISE – Change the New Assignment to the primary Job record

On the Job record where you added an assignment, change it to the Primary Job effective next week.

Conversion Considerations

Over the years, the City has updated the application as newer releases have become available. The data that exists in the application is converted automatically as these releases are implemented. As a result, the data may appear differently then when entered new into the system.

For employees who had multiple concurrent jobs on the system before the 8.9 version of HRMS, they are recorded on the system with multiple employment instances, and prospectively new assignments are added to the primary job instance for these employees.

The following core HR pages will look the same for an employee who may have multiple employment instances (in the 8.9 upgrade) and one or more assignments that were added after the upgrade:

- All Personal Data Pages
- Job Summary Page
- Multi Job Summary Page
- Job Data -- Job Information Page
- Job Data -- Job Labor Page
- Job Data -- Payroll Page
- Job Data -- Salary Plan Page
- Job Data -- Compensation Page
- Job Data -- Earnings Distribution Page
- Job Data -- Benefits Program Participation Page

The following core HR pages will look different for an employee who may have multiple employment instances (due to the 8.9 upgrade) and one or more assignments that were added after the upgrade:

Job Data – Work Location Page

You will see slight variations in the date field description values on the work location page based on whether or not the job record was created as an employment instance or an assignment. If the job is an employment instance, Last Start Date and Termination Date will display. If the job is an assignment, Last Assignment Start Date and Assignment End Date will display.

Job Data – Employment Data Page

You will see variations of date field values on the employment page based on whether or not the job record was created as an employment instance or an assignment. If the job is an employment instance, for the most part the Organizational Instance dates will equal the Organizational Assignment Data dates. If the job is an assignment, the Organizational Instance dates will reflect the controlling instance dates and the Organizational Assignment Data dates will reflect the particular job record dates only.

You will also see differences in the Organizational Instance Rcd field value on the employment page based on whether or not the job record was created as an employment instance or an assignment. If the job is an employment instance, the Empl Rcd # will equal the Organizational Instance Rcd. If the job is an assignment, the Empl Rcd # will not equal the Organizational Instance Rcd.

Organizational Summary Page

This new 9.1 page will look different depending upon whether or not a concurrent job is added as an employment instance or an additional assignment. When there are separate employment instances, you will see the multiple rows identified at the highest scroll level, labeled employment instances. Each instance may show unique last hire and termination dates. When concurrent jobs are added as additional assignments, they show up below the assignment bar. They share status, last hire and termination dates.

ORACLE

Home | Worklist | MultiChan

Favorites | Main Menu > Workforce Administration > Personal Information > Person Organizational Summary

New Windo

Person Organizational Summary

CLIFFORD ZAPATA **Person ID:** 002034

Employment Instances Find | View All First 1 of 4 Last

ORG Instance: 0 **Last Hire:** 06/08/1987 **Termination Date:**

HR Status: Active **Payroll Status:** Active

Assignments Customize | Find | First 1 of 1 Last

Empl Record	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
0	Home	Active	Active	03/10/2011	COMBU	5457		

Person of Interest Instance

Assignments Customize | Find | First 1 of 1 Last

Person of Interest Type	Empl Record	Status	Begin Date/	End Date

Return to Search Notify

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Home | Worklist

Favorites | Main Menu > Workforce Administration > Personal Information > Person Organizational Summary

Person Organizational Summary

PHILIP RICHARDSON **Person ID:** 004802

Employment Instances Find | View All First 1 of 5 Last

ORG Instance: 0 **Last Hire:** 06/11/1979 **Termination Date:**

HR Status: Active **Payroll Status:** Active

Assignments Customize | Find | First 1-5 of 5 Last

Empl Record	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
0	Home	Active	Active	09/20/2009	COMBU	5457		
5	Home	Active	Active	06/28/2009	COMBU	5453	12/16/2007	
6	Home	Active	Active	06/28/2009	COMBU	5453	01/25/2009	
7	Home	Active	Suspended	12/26/2009	COMBU	5453	03/22/2009	
8	Home	Active	Active	05/02/2010	COMBU	5453	05/02/2010	

Person of Interest Instance

Assignments Customize | Find | First 1 of 1 Last

Person of Interest Type	Empl Record	Status	Begin Date/	End Date